# Getting Started with the Infor CRM Web Client

Release 9.4.x

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# Contacting Infor

If you have questions about Infor products, go to Infor Concierge at https://concierge.infor.com/ and create a support incident.

The latest documentation is available from docs.infor.com or in the KB article for your version of Infor CRM SLX. For Infor CRM SLX version 9.4 see KB3565843. For all other versions see KB2289845.

If you have comments about Infor documentation, contact documentation@infor.com.

# Introduction

Infor CRM SLX is a leading customer relationship management solution that enables small to medium-sized businesses to acquire, retain, and develop profitable customer relationships through integrated Sales, Marketing, Customer Service, and Support automation solutions.

## Why Use Infor CRM SLX?

The Infor CRM SLX Web Client helps you manage all aspects of the sales cycle and the customer relationship over the Web. In addition to tracking contacts, accounts, opportunities, tickets, and activities, users have access to tools for reporting, automating processes, and creating e-mails and letters using mail merge.

## Key Features

The following key features describe how you can use the Infor CRM SLX Web Client:

**Contact, Account, and Opportunity Views** - Use the Contact, Account, and Opportunity views to manage detailed information about your contacts, accounts, and opportunities.

**Calendar, Activities and History** - Use the Calendar to view open and completed activities and events. Use the Activities view to manage such daily activities as scheduling phone calls, meetings, and to dos.Use the History List view to viewand manage your history, including completed activities, notes, literature requests, reports, emails, and database changes. If you have additional access rights, you can also view other Infor CRM SLX users' history.

**Lookups** - Use lookups to search for records or build groups. Lookups enable you to filter your record list, and then save the results as a new group. Lookup options vary by record type.

**Groups** - Use groups to organize your contacts, accounts, opportunities, tickets, and other data based on common characteristics. Groups can be used for reporting, mail merges, and more.

**Campaigns and Leads** - Use Leads to develop and qualify new Contacts and Accounts. Use the Campaign functions to combine advertising, public relations, sales promotion, and selling activities to achieve sales or marketing goals.

**Mail Merge** - Use Mail Merge when you need to communicate with leads, contacts, or contacts associated with accounts, opportunities, sales orders, quotes, contracts, returns, or tickets.

**Key Performance Indicators (KPIs)** - are defined for some list views. These KPIs are calculated using the current list of records, based on the group and any filters that have been applied. The KPIs do not display until you select which KPIs you want to display.

**Reports and Analysis** - Use Reports and filters to summarize information about your contacts, accounts, opportunities, contracts, and tickets. The Infor CRM SLX Dashboard view allows you to display performance and analysis information in a dashboard format.

**Customer Service and Support** - Use tickets to track, qualify, and resolve customer questions and issues. You can track time spent working on a ticket through Punch in/Punch out, create ticket activities that are charged against the customer's service contract, and schedule calendar activities. The Service and Support features also provide a means of tracking defects in products or services, and include a return process.

**Literature Requests** - Use literature requests to schedule sending marketing material or other documents to contacts. Literature requests are generally paper materials that must be mailed.

**Library** - Use the Library as a central repository for your company information. The Library often contains items such as product information, sales literature, and presentations.

**Workflows** - Workflows allow you to define and execute workflows within the Infor CRM SLX Web Client application. There are two kinds of workflows, ION Workflows and CRM Workflows. Both use a trigger mechanism to start the workflows based on changes to Infor CRM SLX data.

**Processes** - Use processes to execute a series of tasks in a specific sequence over a set time period. The Infor CRM SLX Web Client offers Sales Processes and Contact Processes.

## About This Guide

The purpose of this guide is to help you begin using the Infor CRM SLX Web Client. This guide uses scenarios to demonstrate how to use the Infor CRM SLX Web Client for many of your daily tasks.

If your company has customized the Infor CRM SLX Web Client, the number, order, and appearance of dialog boxes and screens may be different than described. See your system administrator for more information.

The Help symbol precedes online Help topic names where you can find additional information.

## Related Documentation

- *Infor CRM SLX Quick Reference for the Web User* card provides commonly used buttons, e-mail configuration options, and tips for working with groups and Outlook Integration. The *Infor CRM SLX Quick Reference* card is accessible from the Help menu.
- The Infor CRM SLX Web Client Help provides detailed information about all of the features available over the Web, including additional information about Send to CRM and Mail Merge.

Help is available in each Infor CRM SLX application. Additional resources and documentation are available in the KB article KB3565843 and from docs.infor.com. For all previous Infor CRM SLX versions see KB article KB2289845.

# Chapter 1
# Understanding the Infor CRM SLX Web Client Workspace

Take a few minutes to learn some of the Infor CRM SLX Web Client basics. It will help you become familiar with the workspace and navigation features.

In this chapter, you will learn to:

- Log on to the Infor CRM SLX Web Client
- Understand the Infor CRM SLX Web Client workspace
- Install and use the Infor CRM SLX Mail Merge for Microsoft Word add-in
- Install and use Xbar for Microsoft Outlook
- Get more help

## Signing in to the Infor CRM SLX Web Client

Before you begin, locate your User ID and password. If you do not have this information, contact your system administrator.

**To log on**

1. Connect to your company's Web Client. If you have Windows Authentication configured, then will not complete the remaining steps, but will be automatically logged on the Infor CRM SLX Web Client.
   This can be done several ways, depending on your browser. In many browsers, it is faster to set the initial screen as the default screen of your browser, or to add the initial screen to a list of favorite sites.
2. Specify your **User ID** and **Password**.
   Passwords are case-sensitive. In addition, your system administrator may set restrictions on using blank passwords, your user name as a password, and other options. If necessary, see your system administrator to discuss your password options.
3. If necessary, change the language setting.
   Changing the language will cause the Infor CRM SLX Web Client to display in your selected language. If you do not select a language, then the Infor CRM SLX Web Client will use the default language. The list of languages is based upon the languages supported by your organization.
   - Click the drop-down arrow and select a language from the list of supported languages.

   If your implementation uses Windows Authentication and you do not sign in to the Infor CRM SLX Web Client, you can also select a language from the options User Profile tab.

4. Click **Sign In**.
5. If Multi-Factor Authentication is configured you must complete additional steps for setting up and using the available Multi-Factor Authentication options. See "Signing in with Multi-Factor Authentication" for more information.

**To log off**

- In the lower-right part of the browser window, click **Sign Off**.

## Signing in Using Multi-Factor Authentication

If this is your first time signing in using Multi-Factor Authentication, you must set up your authentication method.

If you plan to use an authenticator application you must first have access to that application on your mobile device.

After signing in, you can manage your Multi-Factor Authentication method methods from the Tools menu, Options, Multi-Factor Authentication tab. See “Multi-Factor Authentication Options”.

**To sign in with Multi-Factor Authentication**

1. On the Infor CRM SLX sign in page type your user name and password and set your language and regional options.
2. Click **Sign In**.
3. If you have not set up an authentication method, then you must first set up a Multi-Factor Authentication method. If you already have set up an authentication method, then proceed to step 4.
    a. Click **Next**.
    b. In the **Name** box type a descriptive name for your authentication method.
    c. Click the **Authentication Method** drop-down arrow and select from the list. The options available depend on what your administrator has implemented, but may include:
        i. Email
        ii. Authenticator Application
    d. Click **Next**.
    e. The next step depends on your authentication method.
        - If you selected Email in step 3c:
            - Proceed to step 4 and follow the instructions for Email authentication.
        - If you selected Authenticator Application in step 3c:
            a. Open your authenticator application, add a new account and either scan the provided QR code or type the provided code that displays below the QR code.
            b. Click **Next** and follow the instructions for Authenticator Application in step 4.

4. The next step depends on your authentication method.
   - If you set up Email authentication:
     a. If necessary, click the **Name** drop-down arrow and select the name of the email authentication method you want to use to sign in.
     b. Click **Send Email Code**.
     c. Go to the email inbox associated with your Infor CRM user email address. When you receive the Multi-Factor Authentication email, copy the **Multi-Factor Authentication code** and paste it into the **TOTP Code** box.
     Make sure to remove any leading or trailing spaces which may cause the authentication to fail.
     d. Click **Continue**.
   - If you set up an Authenticator Application:
     a. If necessary, click the **Name** drop-down arrow and select the name of the authenticator application method you want to use to sign in.
     b. In the **TOTP** Code box type the authentication code provided in the authenticator application you selected in step a.
     c. Click **Continue**.

# Working in the Infor CRM SLX Web Client

The workspace is the area where various views appear in the main Infor CRM SLX Web Client.

Some features require you to enable pop-ups. See your browser help for specific instructions on how to allow pop-ups.

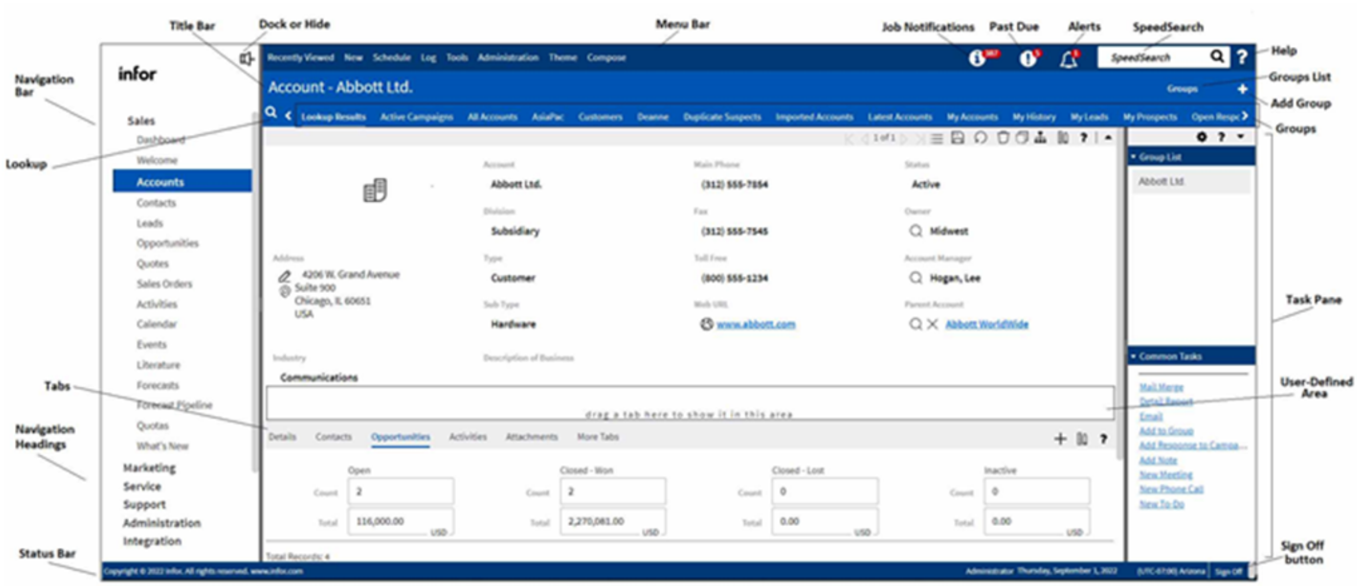



**Figure 1** Infor CRM SLX Web Client Workspace

## Understanding the Workspace Features

Each view in your Infor CRM SLX Web Client contains many of the following elements.

Your workspace may be different depending on your access rights or if your installation has been customized.

| Element | Description |
|---|---|
| Title Bar | The title identifies the active view. When you are in a detail view, the title bar displays the name of the current record. |
| Navigation Bar | Located on the left side of the Infor CRM SLX Web Client workspace, the Navigation Bar contains buttons that open the main Infor CRM SLX Web Client views.<br>The Navigation bar can be docked or hidden. If you cannot see the Navigation Bar, click the icon in upper left corner of your workspace.<br>To dock the Navigation bar, so that it always appears, click the icon. To hide the Navigation Bar, click the icon.<br>Your administrator can group the buttons into Navigation Group subsets that focus on specific elements of your business, such as Sales or Support. For example, the Support group contains Contacts, Tickets, Defects, Activities, Calendar, and Reports.<br>Click the navigation heading to show or hide the iitems listd below the heading. |
| Menu Bar | The menu bar contains the Infor CRM SLX Web Client commands.These include Recently Viewed, New, Schedule, Log, Tools, Compose, Theme, Past Due, Alerts, Job Notification, SpeedSearch, and the Help button. Click a menu to expand it. |
| Lookup | The Lookup button, located to the left of the group tabs in most list and detail views, allows you search from records using one or more search conditions. |
| Speed Search | SpeedSearch helps you find information stored in the Infor CRM SLX database.<br>For example, you can search through existing tickets or procedures to help solve a customer's problem, or search for a specific document, like a presentation. |
| Tabs | Tabs organize information on many of the list views, detail views and dialog boxes. |
| Pick Lists | A pick list is a set of values you can select from when entering data. Pick lists are useful because they encourage consistent data entry. Your access rights determine if you can add, edit, or delete pick list items. To open a pick list, click the drop-down arrow in the box. |
| Task Pane | The Task Pane displays to the right of the main window pane. The Task Pane consists of filters, common tasks and other features designed to help you complete your work. The available options depend on the record type and type of view where you are working. |
| Status Bar | The status bar displays the user, date, time zone and Log Off button |

## Setting Themes and Modes

Use the Themes menu to personalize the appearance of your workspace.

1. Select Theme from the menu bar.
2. Do any of the following:
   - Point to **Modes** and then select **Light**, **Dark**, or **High Contrast**.
     This option determines text and background appearance.
   - Point to **Colors** and select a color theme. The color theme determines the menu bar, title bar, section headings, and highlight colors.

## Using List Views

List views display information in a list with columns and rows of information. Each tab in the list view contains a group of contacts, accounts, opportunities, or tickets and so on.

- You can customize your list view groups by adding or removing columns, changing the column order and adjusting column widths.

  See "Customizing List View Groups" in the Web Client online Help for more information.

- Clicking a column header sorts the information in that column. The arrow marker indicates whether the column is ascending or descending.
- Key Performance Indicators, or KPIs are defined for some list views. These KPIs are calculated using the current list of records, based on the group and any filters that have been applied. The KPIs are not displayed until you select the KPIs you want to display. To select KPIs, click the Manage KPIs icon , select the check boxes of the KPIs to be displayed and click Save. For more information, see "Working with List View KPIs" on page 85.

  If KPIs are not available on the list view, a "No metrics defined for this list view" message is displayed

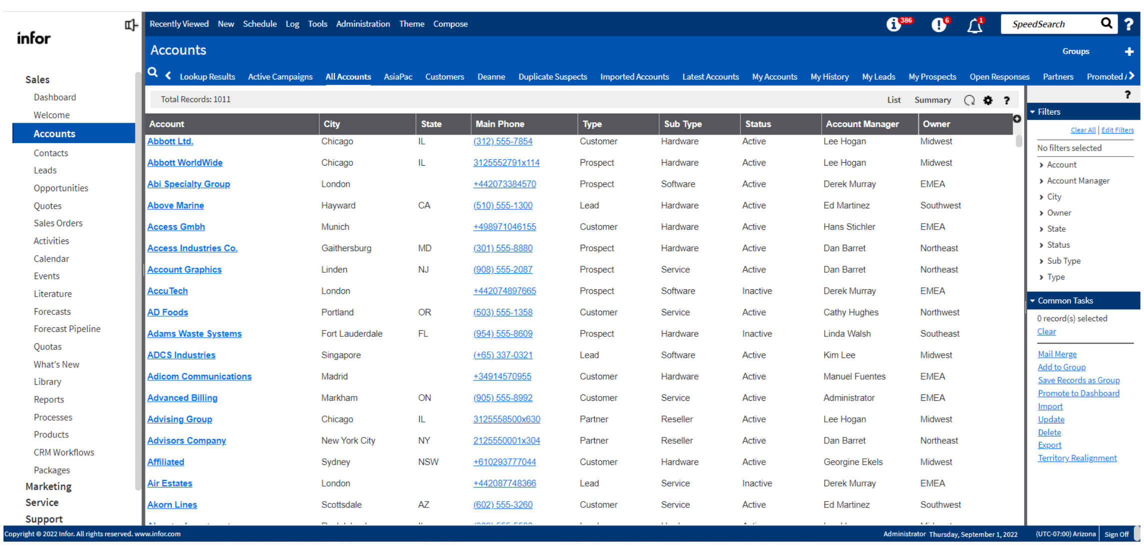



**Figure 2** Account List View

## Using Detail Views

Most records in Infor CRM SLX display information in both a List view and a Detail view. The Detail view consists of information boxes, tabs, and a user-defined middle section.

- The upper section shows basic information about the selected record. When you add a new record, dialog boxes guide you through entering the information that appears in the Detail view. To edit information, click the box you want to change.
- The middle section is called the user-defined area. You can use this area to keep the tab you use most often visible. To move a tab to the middle section, click one of the tabs in the bottom section, hold the mouse button, and drag the tab to this area. The tab will remain open in the user-defined area each time you use the Infor CRM SLX Web Client. If you want to change the tab in the middle section, select another tab and drag it to replace the current tab.
- The lower section contains a group of tabs. Each tab shows specific information you need for the related record. Your system administrator can create custom tabs for your company. Click the and select the check box of the columns you want to appear in the grid and clear the check boxes of the columns you want to hide in the grid. When finished, move your mouse cursor off of the menu and click to close the menu.

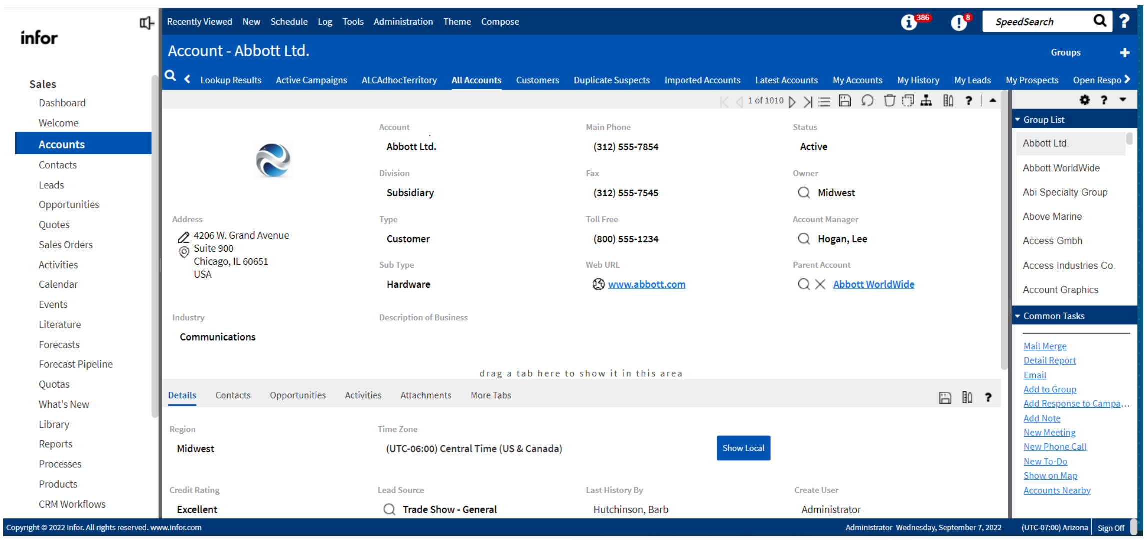
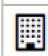
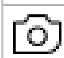
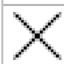
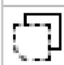
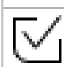


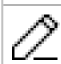
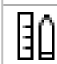
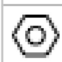
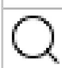
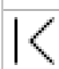

**Figure 3** Account Detail View

## Understanding the available buttons

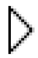
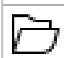
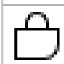
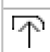
Many features in the Infor CRM SLX Web Client are accessed through buttons. The following list shows each of the buttons available, and describes the action each button performs. When you drag your mouse across a button in the Infor CRM SLX Web Client, a tool tip explaining the button function appears. Buttons are referred to by their tool tip.

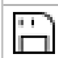
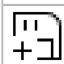
| Button | Tool tip or Description | Event |
|---|---|---|
|  | Accepted | Indicates an activity has been accepted. |
|  | Account Service information | Click this button to open the Account Service Information dialog box. |
|  | Add, Associate | Click this button to add an item. |
|  | Add/Remove Column | Click this button to add or remove grid columns in a list view or tab. |
|  | Add Account/Contact | Quickly add an account and contact when creating a quote or sales order. |
|  | Add Condition | Click this button to add another parameter to the Lookup on the List or Detail views. |
|  | Add Custom Product | Click this button to add a custom product to a sales order orquote. |
|  | Add File | Click this button to attach a file. |
|  | Add Step | Click this button to add a step to a CRM Workflow. |
|  | Add URL | Click this button to attach a Web address URL. |
|  | Alarm | In the Activities list view, identifies if an activity has an alarm. |
|  | Alerts | Click this button to view activities with triggered alarms and unconfirmed activities. |

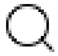
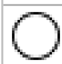
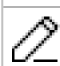
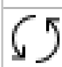
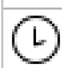
| Button | Tool tip or Description | Event |
|---|---|---|
|  | Approve (CRM Workflow step) | Identifies a CRM Workflow Approve step. |
|  | Associate | Click this button to associate an item. |
|  | Attachment | In the Activities list view, identifies if an activity has an attachment. |
|  | Branch | Identifies a CRM Workflow Branch step. |
|  | Business Rule | Identifies a CRM Workflow Business Rule step. |
|  | Calendar | Click this button to select a date and time. |
|  | Camera | Click this button to take a forecast snapshot. |
|  | Clear | Click this button to clear a lookup selection. |
|  | Collapse | Click this button to hide additional information in a list row. |
|  | Complete | Click this button to complete an activity. |
|  | Copy Information to the Clipboard | Click this button to copy contact information to the Clipboard. |
|  | Create Activity | Identifies a CRM Workflow Create Activity step. |
|  | Create Entity | Identifies a CRM Workflow Create Entity step. |
|  | Create History | Identifies a CRM Workflow Create Entity step. |
|  | Database Change | Indicates the history record type is a database change. |

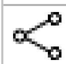
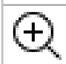
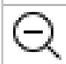
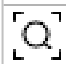
| Button | Tool tip or Description | Event |
| --- | --- | --- |
|  | Declined | Indicates an activity has been declined. |
|  | Delete | Click this button to delete an item. |
|  | Document | Indicates a history item is a mail merge Document. |
|  | Down | Click this button to move a product below another product to change the order on the Opportunity, Quote, or Sales Order Products tab. |
|  | Duplicate | Click to create a copy of a record to create a new record. |
|  | Edit | Click this button to edit information. |
|  | Edit Form | Click this button to open the Web Form Designer.<br>Only users with the appropriate role can access this feature. |
|  | Edit Step | Click this button to edit a CRM Workflow step. |
|  | Ellipsis | Click this button to open a multi-select pick list. |
|  | E-mail | Click this button to open a new e-mail message.<br>Indicates a history item is a sent email. |
|  | Expand | Click this button to view additional information in a list row. |
|  | Filter | Click this button to filter a list of records. |
|  | Find | Click this button to perform a lookup. |
|  | First | Click this button to view the first record in a group. |

| Button | Tool tip or Description | Event |
|---|---|---|
| ? | Help | Click this button to open Web Client Help. |
| | Job Notification | Click the drop-down arrow to display notification details and to access the result of your job. The number next to the icon shows how many jobs are available for you to view. |
| | Last | Click this button to view the last record in a group. |
| | List View | Click this button to switch to the list view. |
| | Literature | Indicates the history record type is a literature request. |
| | Mail Merge | Indicates mail merge step in a customer journey. |
| | Map | Click this button to open a map using the current address information.<br>If Contour integration is enabled and configured it will open a map using the Contour provider. If a provider is not configured then the address will open in MapQuest. |
| | Maximize pane | Click this button to maximize the size of the window pane. |
| | Meeting | Identifies a meeting or meeting step, or click this button to schedule a meeting from the Activities tab. |
| | Merge | Click this button to merge two contacts on an Account detail Contacts tab. |

| Button | Tool tip or Description | Event |
|---|---|---|
|  | Minimize pane | Click this button to minimize the size of the window pane. |
|  | Move Contact | Click this button to move a contact to a different account. |
|  | Next | Click this button to view the next record. |
|  | None | Indicates a "none" step in a customer journey. A none step does not have an action, it is a checklist item. |
|  | Note | History item is a Note or a note step. |
|  | Open Windows Explorer | Click this button to open Windows Explorer to select a file or folder. |
|  | Past Due | Click this button to open the Acitvities view Past Due tab. |
|  | Personal Activity | Identifies a personal activity, or click this button to schedule a meeting from the Activities tab. |
|  | Phone Call | Identifies a phone call or phone call step, or click this button to schedule a meeting from the Activities tab. |
|  | Previous | Click this button to view the previous record. |
|  | Promote | For Back Office Integration only. Click this button to promote a record to a back office application. |
|  | Recurring | Identifies that an activity is part of a recurring activity series. |
|  | Refresh | Click this button to refresh the list of records in a list view. |

| Button | Tool tip or Description | Event |
|---|---|---|
|  | Remove association | Click this button to remove an association between two records. For example, to remove a product from an opportunity. |
|  | Remove Condition | Click this button to remove a parameter from the Lookup on the List or Detail views. |
|  | Report | Indicates a history item is a Report. |
|  | Reset | Click this button to clear any changes you've made since the last update. |
|  | Save | Click this button to save your changes. |
|  | Save & Clear | Click this button to save the current record and clear the information in order to insert a new record. |
|  | Save & New | Click this button to save the current record and retain the account information. |
|  | Send Email | Identifies a CRM Workflow Send Email step. |
|  | Send to Email | Click this button to open an email message with the contents of the note or history copied and pasted in the message. |
|  | Send to Word | Click this button to open a Microsoft Word document with the contents of the note or history copied and pasted in the document. |

| Button | Tool tip or Description | Event |
|---|---|---|
|  | Share | Click this button to share a place in Contour. |
|  | SpeedSearch | Click this button to open SpeedSearch. |
|  | Start | Identifies a CRM Workflow Start step. |
|  | Start New Workflow | Identifies a CRM Workflow Start New Workflow step. |
|  | Stop Workflow | Identifies a CRM Workflow Stop Workflow step. |
|  | Sync or Sync Enable | Click to start a manual synchronization or enable synchronization. |
|  | Sync Disable | Click to disable synchronization. |
|  | Test Condition | Identifies a CRM Workflow Test Condition step. |
|  | To Do | Identifies a to do, or click this button to schedule a meeting from the Activities tab. |
|  | Unconfirmed | Indicates an activity has not been accepted or declined. |
|  | Up | Click this button to move a product above another product to change the order on the Opportunity, Quote, or Sales Order Products tab. |
|  | Update Entity | Identifies a CRM Workflow Update Entity step. |
|  | Update Target | Click to update the campaign target list. |
|  | User Date Stamp | Click this button to put a user name and date stamp in your ticket notes. |

| Button | Tool tip or Description | Event |
|---|---|---|
|  | View Parent/Child Hierarchy | Click to view an account's parent and child relationships to other accounts. |
|  | Workflow | Indicates workflow step in a customer journey. |
|  | WWW | Click this button to go to a Web site. |
|  | Zoom In | Click this button to zoom in closer in the workflow on the CRM Workflow Designer tab. |
|  | Zoom Out | Click this button to zoom out closer in the workflow on the CRM Workflow Designer tab. |
|  | Zoom Reset | Click this button to reset the zoom to 100% in the workflow on the CRM Workflow Designer tab. |

# Searching for Information

Use SpeedSearch to set up your search criteria and start a search. How you set up the search criteria determines how and where SpeedSearch locates items matching the keywords you enter.

**To search for information**

1. In the menu bar, click the **SpeedSearch** drop-down arrow and select the check boxes of the record types you want to search.
   - Your previously selected options remain selected until you clear them.
   - If you are in a list or detail view, and SpeedSearch is set up to search against the record type, the in focus record type will automatically be selected to search.
   - Your most frequently used options are listed under Most Frequently Used.
2. Type your search criteria in the **SpeedSearch** box. As you type, a list of matching options displays below based on the selected record types.
3. Click (SpeedSearch).
   SpeedSearch opens with your search results.

4. View the search results for each of the selected record types and do any of the following.
   - Hover the mouse over the number link in the Matches column to see the matching information.
   - Click the **Name** column link to open the detail view of the record.
   - Click the Minimize icon to collapse the results of any record type. To expand the results, click the Maximize icon.
5. If necessary, under **Options** make changes to any of the following to update your search criteria:
   - Change the number of records to display for each record type: In the **Maximum Results** box, click the drop-down arrow and select an option from the list.
   - Change the Search Method: Click the **Search Method** drop-down arrow and select one of the following options:
     - **Match on all words (AND)** – The search only locates items containing all of the keywords but they do not have to appear together in the record/document. The search ignores words like "and", "the", and "a".
     - **Match on any word (OR)** – The search locates items containing at least one of the keywords you entered.
     - **Match the exact phrase** – The search only locates items containing all of the keywords appearing together exactly as you entered them in the Keywords box.
     - **Boolean (AND, OR, NOT)** – The search uses straight search logic to locate items containing the keywords; words like "and", "the", and "a" are included if you type them in the Keywords box.
     - **Natural Language** – If you type a sentence in the Keywords box and this option is selected, the search interprets the sentence to determine which keywords to locate. Natural language searches may take longer than other searches.
   - Select or clear the search options.
     - **Root** – The search looks for root words in addition to any keywords you entered containing prefixes, suffixes, or alternate verb forms. (For example, if you entered "printing" it would also search for "print".)
     - **Thesaurus** – The search looks for synonyms in addition to the keywords you entered. (For example, if you entered "customer", it would also search for "client".)
     - **Sounds Like** – The search looks for words that sound similar to the keywords you entered. (For example, if you entered "Smith", it would also search for "Smythe".)

   If you use the Match the exact phrase search method and any of the three options: Root, Thesaurus or Sounds Like, there is a possibility that the search may return more records than you intended. In order to find specific records, use large phrases with more descriptive words and clear the three check box options.

6. When finished you can navigate to another view by clicking a link in the results or use the menus or navigation bar.

# Getting Help

Information on advanced features and areas not covered in this guide is available in the Infor CRM SLX Web Client online Help topics.

**To access online Help**

- Click the Help button ? .

| What do you want to do? | Topic Name |
|---|---|
| Log on to the Infor CRM SLX Web Client. | Logging on to the Infor CRM SLX Web Client |
| Find out what new features have been added to the Infor CRM SLX Web Client. | What's New in This Release |
| Find useful tips for first-time users. | New User Tips |
| Use Alerts to help me manage my activities. | Using Alerts |
| Customize the Infor CRM SLX Web Client options for my personal needs. | Editing User Options |
| Schedule a meeting and invite others. | Scheduling or Editing an Activity |
| Schedule an Event (such as a trade show). | Scheduling or Editing an Event |
| Access an overview of Sales Processes. | What are Sales Processes? |
| Add a campaign response for a campaign target | Adding or Editing a Response Information |

See your system administrator for answers specific to your Infor CRM SLX installation.

# Understanding Infor CRM SLX Mail Merge for Microsoft Word

The Infor CRM SLX Mail Merge for Microsoft Word add-in provides support for Mail Merge in Microsoft Word,including creating and managing templates and performing mail merges output to file, print, or email.

## Installing Mail Merge for Microsoft Word

Before you can use Mail Merge for Microsoft Word you must install the Infor CRM SLX Mail Merge for Microsoft Word add-in.

**To install the Mail Merge for Microsoft Word add-in**

1. Close Microsoft Word.
2. On the **Tools** menu, click **Options**.
3. Click the **General** tab.
4. Click **Install Mail Merge for Microsoft Word**.
5. Open the **InforCRMWordAddinSetup.exe** from your Downloads folder.
6. Select the **I agree to the license terms and conditions** check box.
7. Click **Install**.
8. If prompted, click **Yes** to confirm that you want to install the add-in.
9. Click **Close**.
10. Open Microsoft Word.
11. If prompted "Are you sure you want to install this customization?" click **Install**.
12. Once installed, you must set Infor CRM SLX Options.

## Setting Infor CRM SLX Options

Use the Connection options to set up your connection to the Infor CRM SLX server.

These options are configured for users who set these options for Infor CRM SLX Xbar for Microsoft Outlook.

**To set Connection options**

1. In Microsoft Word, on the **Mailings** tab, click the **Infor CRM SLX Options** button and, if necessary, click **Connection**.
2. In the **SData URL** field, specify the server name and SData portal.
   - Specify the SData URL that your administrator provided in order to connect to Infor CRM SLX. Use the following format: http://servername:port/sdata or https://servername:port/sdata
   - Offline Web Client users - Specify the URL to connect to your local Infor CRM SLX server. Use the following format: http://localhost:port/Sdata The port is usually 8088.
3. If your implementation does not use the standard SlxClient portal for the Web Client, then in the **Web Client URL** field, specify the server name and Web Client portal.
   This is automatically completed for you if your implementation uses the standard SlxClient portal, and no changes are needed.
   - Specify the URL that your administrator provided in order to connect to the Infor CRM SLX Web Client. Use the following format: http://servername:port/<portal name> or https://servername:port/<portalname>
   - Offline Web Client users - Specify the URL to connect to your local Infor CRM SLX Web Client Use the following format: http://localhost:port/<portal name> The port is usually 8088.
4. If you use your Windows account information to log in to Infor CRM SLX, select the **Use Windows Authentication** option, otherwise leave this option cleared.
5. Specify the **User Name** and **Password** you use to sign in to Infor CRM SLX. This is your Infor CRM SLX or Windows user name and password.

   If your implementation uses Infor OS, you must not enter your credentials in this dialog box. You are prompted to enter your Infor OS credentials.

6. Click **Test**. If the test fails, review your connection information. If the information is correct and you still cannot connect, contact the administrator.
7. Click **OK** when you are finished setting your options and your connection test is successful.

# Understanding Infor CRM SLX Integration with Microsoft Outlook

Outlook Integration features are now installed with Infor CRM Xbar for Microsoft Outlook.

The Infor CRM SLX Xbar for Microsoft Outlook installation provides support for:

- Xbar
  - Access key contact information, activities and opportunities in Infor CRM SLX from Outlook e-mail correspondence or calendar activities.
  - Create new contacts, accounts and opportunities by dragging and dropping existing information from e-mail into the Xbar interface.
  - Make changes to contact, calendar, and interaction history in Xbar that automatically updates within Infor CRM SLX.

    For more information about Xbar for Outlook features, please refer to the Xbar help. Click the icon to open the Global menu and access the help file.

    Field level security defined in the Infor CRM SLX Web Client Security Manager applies to Infor CRM SLX Xbar for Microsoft Outlook version 1.3.7 or later.
- Outlook Integration
  - Record email messages to history
  - Integrate with the Microsoft Outlook Address Book
  - Drag and Drop E-mail from Microsoft Outlook
  - Send an Infor CRM SLX contact's information in a vCard file format via e-mail
  - Attach documents from Infor CRM SLX Library to a message in Outlook
- Infor CRM SLX Activity Task Pane
- Using Outlook Synchronization allows you to synchronize:
  - Contacts
  - Leads
  - Calendar

# Installing Infor CRM Xbar for Microsoft Outlook

Outlook Integration features are now installed with Xbar. Before you can use any of these features you must install Infor CRM Xbar for Microsoft Outlook. For more information about installing Infor CRM SLX Xbar for Microsoft Outlook, please contact your administrator.

**To install Infor CRM Xbar for Microsoft Outlook from the Infor CRM SLX Web Client**

1. Do one of the following:
   - If you are an [[[Undefined variable MyVariables.Infor CRM]]] Web Client user:
     a. Sign in to the **[[[Undefined variable MyVariables.Infor CRM]]] Web Client**, expand the **Tools** menu and then click **Options**.
     b. In the **Options** window, click the **General** tab, and then click **Install Xbar for Outlook**.

        The Infor CRM Xbar Setup.exe is copied to your download folder.
   - If you are an **[[[Undefined variable MyVariables.Infor CRM]]] Windows Client** user:
     a. Browse to the location provided by your Infor CRM Administrator and copy the **[[[Undefined variable MyVariables.Top Zip]]]** to any convenient folder.
        - Ensure you have Write permissions to the folder where you are saving the zip file. You can check permissions on the Security tab on the folder properties.
        - Ensure the folder path is as short as possible, as there is a 57 character limit.

     b. Extract the zip file.
2. Click **[[[Undefined variable MyVariables.Exe]]]**, and then click **Install**.
3. Click **Setup.exe**.
4. Click **Run**, and then click **Install**.
5. After the **Microsoft Office Customization Successfully Installed** message appears, click **Close**.
6. If prompted to allow Infor CRM Xbar to make changes to your device, click **Yes**.
7. After the **Setup Successful** message appears, click **Close**.
8. If the Infor CRM Desktop Manager screen opens, click the help button and browse to the help topic called *Setting Desktop Manager Database Information and History Options* for instructions on setting up Desktop Manager to connect with your installation of Infor CRM.
9. Start Microsoft Outlook.
10. In **Infor CRM Connection Options**, click the **Connection** tab and complete the following.
    a. In the **Server** field, specify your server name.
       - Infor CRM SLX Client and Infor CRM SLX Web Client users - Type the URL that your administrator provided in order to connect to Infor CRM SLX. Use this format:
         http://servername:port or https://servername:port
       - Offline Web Client users - Type the URL to connect to your local Infor CRM SLX server. Use the following format:
         http://localhost:port
         The port is usually 8088.

b. Do one of the following:

- **Use Windows Authentication**: Select this check box if you use your Windows user name and password to sign in to the Windows or Web Clients.

  Windows Authentication must be configured by your Administrator. If you do not know if Windows Authentication is configured for your organization, contact your Administrator.

- Specify your [[[Undefined variable MyVariables.Infor CRM]]] User Name and Password:
  - **User Name**: Type your username. This is the username you use to sign in to the [[[Undefined variable MyVariables.Infor CRM]]] Clients.

    If your implementation is integrated with Infor OS, then you use your Infor OS username to sign in to [[[Undefined variable MyVariables.Infor CRM]]].

  - **Password**: Type your password. This is the password you use to sign in to the [[[Undefined variable MyVariables.Infor CRM]]] Clients.

    If your implementation is integrated with Infor OS, then you use your Infor OS password to sign in to [[[Undefined variable MyVariables.Infor CRM]]].

c. Click **Test**.
If the test fails, review your connection information. If the information is correct and you still cannot connect, contact the administrator.

d. In the **Connect the Go To CRM** button to section, select the Infor CRM SLX client you use.

- If you use the Infor CRM SLX Windows Client, select the **Infor CRM Windows Client** option.
  This option is unavailable if the Infor Windows Client is not installed.
- If you use the Infor CRM SLX Web Client, select the **Infor CRM Web Client** option and then if necessary, in the **URL** field, specify the URL that the administrator provided in order to connect to Infor CRM SLX. Use this format:
  http://servername:port/slxclient or https://servername:port/slxclient

11. If you are upgrading an existing installation of Xbar, you may be automatically signed into Xbar using your prior credentials. Should you need to use different credentials, you can do so by expanding the 'Global' menu, clicking Settings, and making your changes in the Server Configuration screen.

## Configuring Outlook Integration

Outlook integration preferences should be configured in Microsoft Outlook.

Before you can configure Outlook:

- Microsoft Outlook must be installed and running on the local machine.
  - Web - Infor CRM SLX Xbar for Microsoft Outlook will not install unless Microsoft Office, including Outlook, is already installed.
  - Advanced - To enable drag and drop from Outlook to Infor CRM SLX Web Client using all browsers.
- You must know the connection server and port number and your user name and password.
  Contact your system administrator for more information.

**To configure**

1. Open Microsoft Outlook.
2. If you are not prompted, click the **Options** button.
   If the Options button does not appear, then Outlook Sync has not been installed properly.
3. Use the tabs to set the following options:
   - Connection - connection to the Infor CRM SLX server. Required for contact and calendar synchronization and e-mail integration.

     These options are shared with the Infor CRM SLX Mail Merge for Microsoft Word add-in and may already be configured if you previously set these options for the add-in.

   - Appointment Filters - Defines how appointments are synchronized between Microsoft Outlook and Infor CRM SLX
   - Xbar side Panel - set options specific to Infor CRM SLX Xbar For Microsoft Outlook.
   - Send to CRM/Record to History - options for prompts, displaying information, and attachment behavior when using Send to CRM or Record to History. Used for e-mail integration.
   - All Options - ability to view options as value pairs. Recommended for advanced users only.
     For more information see the Outlook Sync help topic "Configuring Outlook Sync".
4. Click **OK**.

# Chapter 2
# Managing Contacts and Accounts

This chapter introduces you to the core of Customer Relationship Management (CRM) - working with contacts and accounts.

- Contacts are the key people associated with an account.
- Accounts are your prospects and customers. Accounts can contain one or many contacts.

You can use Infor CRM SLX to manage contact and account information. This includes daily interactions, such as phone calls, meetings, action items, or other correspondence.

In this chapter, you will learn to:

- Add a contact and an account
- Create an account association
- Use the Library
- Schedule a literature request
- Add a note and schedule a follow-up activity

## Adding a Contact and an Account

Infor CRM SLX focuses on account relationships. Therefore, all contacts must be attached to an account. Account and contact information is accessible by any Infor CRM SLX user who has the appropriate security. For example, you can create an account for Beeker Motors. Your Sales Assistant may not have the required security to access the account, but your Sales Manager can.

### Understanding Account Ownership

Before creating an account in Infor, it is important to understand account ownership.

- The *Account Owner* has access to an account and can use any account-related activities such as scheduling activities and running reports. An account owner can be an individual user, a team, or all Infor CRM SLX users. Access to account data can be different for each user. For example, if a team owns an account, some team members may have read-only access to the account, while others have read/write access. Security is controlled by your system administrator.
- The *Account Manager* is responsible for managing the relationship with the account. This can include follow-up phone calls, meetings, preparing proposals, and working with the account's contacts. The account manager is a single individual.

The individual user designated as the account owner is often also set as the account manager. If a team is the account owner, a team member will usually be set as the account manager. Account owners and account manager should be assigned according to your company's guidelines.

There are several ways to add contacts and accounts to Infor CRM SLX. This guide will explain the most common methods.

| **Our scenario:** |
| --- |
| You met Tom Dale and Joan Smith at a trade show. Tom and Joan (contacts) work for Beeker Motors (account). First you will add contact Tom Dale to a new account (Beeker Motors); then you will add Joan Smith to an existing account (Beeker Motors). |

**To add contacts and an account**

1. On the **New** menu, click **Account/Contact**.
2. In the **Contact** box, type **Tom Dale**.
   To add hyphenated last names or names with a professional designation, click the Edit button next to the Contact box. Then use the Edit Name dialog box to specify a name prefix (such as Dr.), first name, middle name, last name, or suffix (such as C.P.A).
3. In the **Account** box, type **Beeker Motors**.
4. In the **E-mail** and **Web** boxes, add e-mail and Web address information.
   - E-mail: **tom.dale@beeker.mail**
   - Web: **www.beeker.web**
5. In the **Work Phone** field, type **5551234512**.
6. Click the **Look for Matching Records** button.
   This searches the database for records that have the same e-mail address, Web address, phone number, and account. It is important to search for records before adding information. If you do not check for existing information, you might create a duplicate contact or account.
7. Click **Cancel** to close the **Matching Records** dialog box, or if a duplicate record is found click **Open** next to a record to view additional details or **Use Account** to select a record.
   If you select Use Account, the account appears next to the Use Existing Account ... label in the Insert Contact/Account view.
8. In the **Contact Information** area, in the **Title** box, click the drop-down arrow and select **Vice President**.
9. Continue to add Tom's information in the **Contact Information** section.
10. Under **Account Information**, double-click in the **Address** box to open the **Address** dialog box and add the Address information for Beeker Motors, as follows:
    - Leave **Description** as **Office**.
    - Select **Primary** to identify this address as the primary address for this account.
    - Click the **Address Type** drop-down arrow and select **Billing & Shipping**.
    - In the **Address 1** box type **1234 Gary Parkway**
    - In **City**, **State**, **Postal Code** type **Oak Park**, **IL 60305**
11. Click **OK**.
12. (Optional) Use the **Maps** icon to see a map of the address.
13. In the **Main** box type **5551234500**.
14. Click the **Type** drop-down arrow and select **Customer**.
15. Click the **Status** drop-down arrow and select **Active**.
16. Click the **Industry** drop-down arrow and select **Automotive/Aerospace**.
17. In the **Account Manager** box, click the **Find** button, and then select the account manager.
18. In the **Owner** box, click the **Find** button, and then select an owner.
19. In the **Lead Source** box, click the drop-down arrow and select **Trade Show**.

20. Click the **Save & New** button.
    This option allows you to add another contact to the existing account.
21. In the **Contact** box, type **Joan Smith**.
22. In the **E-mail** and **Work Phone** boxes, add e-mail and Work Phone information.
    - E-mail - **joan.smith@beeker.mail**
    - Work Phone - **5551234519**
23. In the **Contact Information** area, in the **Title** box, click the drop-down arrow and select **Managing Director**.
24. Click **Save**.

For more information see the "Adding a New Contact and Account" topic in the Infor CRM SLX Web Client Help.

If you need to edit a contact or account's information, you can do so by clicking the boxes on the Detail view and typing in the changes.

You must click the Save button after making any changes.

## Adding an Account Association

Accounts may have a common connection, for example, one company may be a parent of another. You can create a relationship between accounts by adding an association. This association can be helpful for tasks like running reports. You can create one report for both accounts rather than two separate reports. Associations can also create opportunities for you to sell to parent companies rather than subsidiaries.

| Our scenario: |
| --- |
| Tom Dale told you that Beeker Motors was owned by International Machines. You want to create a parent/subsidiary relationship between the two accounts. |

**To associate accounts**

1. Open the Beeker Motors Account Detail view.
    a. On the Navigation Bar, click **Accounts**.
    b. Click the Lookup tab (magnifying glass).
    c. In the first box select **Account**, in the second box select **Starting With**, in the third box type **Be**, and then click **Search**.
    d. In the list, click Beeker Motors.
2. On the Beeker Motors Account Detail view, click the **Associations** tab. If the tab is not visible, click the **More Tabs** tab.
3. Click the **Add Association** button.
4. Click the **Find** button (magnifying glass).
5. In the **Lookup Account** box, make sure **Lookup Accounts by**: shows **Account**, type **Int**, and then click the **Search** button.
6. Click **International Machines** in the account list, and then click **OK**.
7. Click the drop-down arrow below **Beeker Motors is a** and select **Subsidiary**.
8. Click the drop-down arrow below **International Machines is a** and select **Parent**.

9. In the **Description** boxes, type a description for each account.
10. Click **OK**.

# Working with the Library

The Library is a central repository for company information. Files are organized into folders and sorted by name. Click the column headings to sort the library files list.

Your company’s library may include product information, policies and procedures, presentations, Web addresses, and so forth. Only the administrator and an administrative user can add files to the Library.

| Our scenario: |
|---|
| You want to use the Library to find current product information. |

**To access information from the Library**

1. On the Navigation Bar, click **Library**.
2. In the tree view, click the "+" signs to expand the folder that contains the file you want to open.
3. In the list, click the **File** name of the file you want to download.
4. Do one of the following:
   - Open the file
   - Save the file

For more information see the "Working with the Library" topic in the Infor CRM SLX Web Client Help.

# Requesting Literature for a Contact

Literature requests involve sending marketing materials or other company documents to one or more contacts. Infor CRM SLX users or the system administrator manage the available literature. After you schedule a request, the person or group at your company responsible for literature fulfillment can fulfill and complete the request.

If you are making the request for a single contact, select the contact before you begin the following steps.

| Our scenario: |
|---|
| Joan Smith requested information on a specific product at a trade show, but you had run out of brochures. You want to schedule a literature request to send the information to Joan. |

**To schedule**

1. Open Joan Smith's Contact Detail view.
   a. On the Navigation Bar, click **Contacts**.
   b. Click the **Latest Contacts** group tab.
   c. In the Task Pane, under **Filters**, click **Name** and select **S**.
   d. In the list, click **Smith, Joan**.
2. On the **Schedule** menu, click **Literature Request**.
3. In the **Description** box, enter a brief description of the literature request.
   - Type **Lenovo ThinkPad sales brochure**.
4. To select who the literature request is for, do one of the following:
   - To create the request for a single contact, select **Contact**, click the Lookup Contact button and select a contact. Since we scheduled the literature request from Joan Smith's contact detail view, Contact is already populated with Joan Smith.
   - To create the request for a group of contacts, select **Group**, and then click the drop-down arrow and select from the list.
   - To create the request for an opportunity, select **Opportunity**, click the Lookup Opportunity button, use the lookup to select an opportunity , and then click **Close**.
5. Click the **Send by Calendar** button, select a date, and then click **OK**.
6. Select the **Handle Fulfillment Locally** check box to save the file locally after you schedule the literature request.
7. In the **Send via** (delivery method), and **Priority** boxes, click the drop-down arrow, select **FedEx** and **Medium**.
8. Under **Print Literature List**, select **with cover letter**.
9. Click the **Cover Find** button, expand **Public Templates**, expand **Letter**, select **Company Information**, and the click **OK**.
10. Under **Available Items**, select the items you want to include in your request.
    a. If necessary, click the **Filter available items** button and enter any characters contained in the family, number or name of the item you want to add.
    b. Select **Lenovo ThinkPad Brochure**.
    c. Double-click in the **Quantity** column and type the number of copies of that item you want to request. Type **2**.
11. **Click the Schedule Literature Request** (Save) button.

The literature request is recorded on the Literature Requests list view and on the Literature Requests tabs in the Contact and Account Detail views.

The person assigned by the administrator to monitor Literature Requests will receive your request and should fulfill it by the date you specified.

# Scheduling a Follow-up Activity

In Infor CRM SLX, phone calls, meetings, to-dos, and personal appointments are called activities. Scheduling follow-up activities can help you organize and remember important events.

| Our scenario: |
| --- |
| You want to schedule a phone call to follow-up on literature that was sent to Joan Smith. |

**To schedule a phone call**

1. Open Joan Smith's Contact Detail view.
2. On the **Schedule** menu, click **Phone Call**.
3. In the **Regarding** box, click the drop-down arrow, and select **Confirm Literature Received**.
4. Use the **Location** field to type a location.
5. In the **Start Time** box, click the **Calendar** button to select the date and time when the activity will occur, and then click **OK**.
6. Do one of the following:
   - Select the **Timeless** check box to create an activity that occurs on a specific date, but at no specific time and without a specific duration.
     Timeless activities are displayed on the Calendar day view.
   - In the **Duration** box, type or click the drop-down arrow and select from the list.
7. Select the **Alarm** check box to set an alarm to notify you before the activity begins. Type or select a length of time.
8. Verify that your name is in the **Leader** box.
9. In the **Notes** box, type **Follow-up call for Joan Smith's literature request**.
10. Under **Associations**, verify the **Associations** list contains **Joan Smith** and **Beeker Motors**.

    When you add an association, the activity appears on the Activities tab on the associated detail view.

    a. To add additional contacts, accounts, opportunities, quotes, sales orders, campaigns, leads, defects, returns, or tickets, click the drop-down arrow, select the record type from the list, and then click the **Add activity association** icon.
    b. Use the Lookup to find the records you want to associate with the activity, and then click **Add Selected**.
    c. If you associate contacts or leads, you will be asked if you want to add the contacts or leads as attendees.
       - To add associated contacts or leads to the Attendees tab, click **Yes**.
       - To leave the records as associations only, click **No**.
    d. Repeat steps a-c for each record you want to associate.
11. In the **Associations** list you can hover over the record name to view limited detailed information. The details that display depend on the record type. To hide these details, move the cursor to a different location in the view.
12. Click the **Availability** tab to make sure you are available at the selected Start Time and or to add resources or other members.

    You can only add members or resources to phone calls and meetings.

13. Click the **Attendees** tab to include additional contacts and leads.
14. Click **OK**.

You can view the scheduled phone call in the Contactand Account detail views (on the Activities tab), in the Activities view (on the All Open and My Activities tabs), and in the Calendar view.

For more information see the "Scheduling or Editing an Activity" topic in the Infor CRM SLX Web Client Help.

# Adding a Note

You use notes to document the outcome of an activity and to record interactions with an account, contact, lead, or opportunity. The notes you add appear in the Notes/History tab on the detail views.

There are several ways to add a note. One method was chosen for the example below.

| Our scenario: |
| --- |
| You found Tom Dale’s business card while cleaning out your briefcase. You had a note on the back indicating Tom was interested in a support contract for any products his company purchased. You want to add this information to Infor CRM SLX. |

### To add a note

1. Open Tom Dale’s Contact Detail view.
2. On the **New** menu, click **Note**.
3. In the **Regarding** box, type **Business card notes**.
4. In the **Location** box, type **2025 Trade Show**.
5. In the **Category** box, click the drop-down arrow and select an item from the list.
6. In the **Priority** box, click the drop-down arrow and select an item from the list.
7. If necessary, modify the **Completed** and **Scheduled** dates. To modify the date, click the **Calendar** button to select the date.
8. Leave **Timeless** selected since you do not need to enter a duration for the note.
9. Verify that your name is in the **Leader** box.
10. In the **Notes** box, type the information on the business card.
11. Under **Associations**, verify the **Associations** list contains **Tom Dale** and **Beeker Motors**.

    When you add an association, the note appears on the Notes/History tab on the associated detail view.

    a. To add additional contacts, accounts, opportunities, quotes, sales orders, campaigns, leads, defects, returns, or tickets, click the drop-down arrow, select the record type from the list, and then click the **Add activity association** icon.

    b. Use the Lookup to find the records you want to associate with the activity, and then click **Add Selected**.

    c. If you associate contacts or leads, you will be asked if you want to add the contacts or leads as attendees.

    - To add associated contacts or leads to the Attendees tab, click **Yes**.
    - To leave the records as associations only, click **No**.

    d. Repeat steps a-c for each record you want to associate.
12. Click the **Follow-up** drop-down arrow and select the follow-up activity type. Select **To-Do**.Schedule a follow-up activity.
13. Use the **Carry Over Notes** or **Carry Over Attachments** check boxes to copy notes or attachments from this note to the follow-up activity.
14. If necessary, click the **Attachments** tab to add a document or URL.
15. Click **OK**.

16. In the **Schedule To-Do** dialog box, schedule an activity for today.
    a. For the **Regarding** type **Research**.
    b. In the **Notes** type, **Research a support contract for Beeker Motors**.
    c. Click **OK** to schedule the activity.

You can view notes on the Notes/History tab of the Contact, Account, Lead, and Opportunity Detail views. In addition, the Notes/History tab allows you to view and filter notes and other history items.

For more information see the "Adding a Note" topic in the Infor CRM SLX Web Client Help.

# Chapter 3
# Managing Your Sales Activities

Infor CRM SLX can help you manage your daily activities, whether they are scheduled or unscheduled. Scheduled activities include phone calls, meetings, to-dos, and appointments. Unscheduled activities, such as returning a phone call or answering e-mail, may occur several times a day.

In this chapter, you will learn to:

- Use Alerts
- Complete an unscheduled activity and schedule a meeting
- Use the Calendar and Activities views
- View the history of an account

## Using Activities and Events

Activities and Events provide a way to stay on top of your work responsibilities.

- Events usually span several days and might include trade shows, business trips and conferences.
- Activities include placing phone calls, attending meetings, and to do's, such as sending correspondence or preparing presentations.
- Activities can be associated withother records such as contacts, accounts, leads, opportunities, tickets,quotes, sales orders and others. Activities are generally scheduled for a specific time, but can also bescheduled as "timeless" activities. Activities are generally scheduled for a specific time, but can also be scheduled as "timeless" activities. Completed activities become history items.
- You can schedule activities during an event, such as setting up various appointments and meetings for a business trip.

When you schedule an activity, it displays on the Calendar, Activities view, and in the Activities tabs on the asociated detail views. Activities are generally scheduled for a specific time, but can also bescheduled as "timeless" activities. Completed activities become history items. The Infor CRM SLX Web Client includes an Alerts feature that alerts you to overdue activities and new activities that you have yet to confirm.

Several activity types are available to accommodate your work requirements. For instance, you can create single occurrence activities or recurring activities. In general, you can edit, delete, or complete activities and events that you create.

### Using Alerts

Alerts help you keep track of activities with triggered alarms and unconfirmed activities. Your Alerts options determine how you will be alerted for alarms and new unconfirmed activities.

You can snooze or dismiss selected activity alarms, or snooze or dismiss all of your alarms. You can also view Activity details and accept or decline unconfirmed activities.

#### To view Alerts

- If the Alerts notification appears in your menu bar, click the drop-down arrow to display **Alerts** details.

> If the Alerts notification does not appear in your menu bar, then either you have no current alerts or your Alerts options may need to be changed.

#### To minimize Alerts

- If you want to hide your active Alerts, click the drop-down arrow in the Alerts area of the menu bar.
  The Alerts view will remain minimized until you click the drop-down arrow again or you receive a new alert.

### Alerts - Alarms Tab

The Alarms tab in the Alerts view lists activities with active alarms. You can snooze or dismiss alarms or view, complete or delete activities from the Alarms tab.

#### To snooze alarms

1. Select the check box for each activity alarm you want to snooze.
2. Select a time increment in the **Snooze by** box, and then do one of the following:
   - Click **Snooze** to snooze any selected activity alarms.
   - Click **Snooze All** to snooze all of the activity alarms, even if they are not selected.

#### To dismiss alarms

- Do one of the following:
  - Select the check box for each alarm you want to dismiss, and then click **Dismiss**.
  - To dismiss all alarms, click **Dismiss All**.

#### To go to the activity detail view

- Click the activity type and regarding information that appears in blue text next to the activity icon.
  Your Alerts are hidden and the activity detail view opens.

#### To view contact, account, or lead details

- Click the record name link.

#### To complete activities

1. Select the check box for each activity you want to complete.
2. Click the **Complete selected activities** button in the top part of the view.

#### To delete activities

1. Select the check box for each activity you want to delete.
2. Click the **Delete Selected** button in the top part of the view.
3. Click **OK** to confirm the deletions.

### Alerts - Unconfirmed Tab

An unconfirmed activity is an activity notification that you need to confirm or decline.

#### To view unconfirmed activity details

- Click the activity type and regarding information that appears in blue text next to the activity icon.
  Your Alerts are hidden and the activity detail view opens.

#### To accept or decline an unconfirmed activity

1. In the grid, click the unconfirmed activity that you want to accept or decline.
2. Do one of the following:
   - Click **Accept** to confirm that you will attend a phone call or meeting.
   - Click **Decline** to confirm that you will not attend a phone call or meeting.

#### To go to the Calendar view

- Click the **Show Calendar** link at the bottom of the view.

#### To go to the Confirmations tab on the Activity view

- Click the **Show Confirmations** link at the bottom of the view.

## Completing an Unscheduled Activity

Unscheduled activities can occur unexpectedly throughout the day. It is a good idea to keep Infor CRM SLX open at all times so you can quickly access contact and account information. After you respond to an unscheduled activity, you should complete the activity in Infor CRM SLX to create a record of the interaction with the contact or account.

When you complete an activity, details about it are recorded on the Notes/History tab for the related account, contact, opportunity, or lead.

| Our scenario: |
| --- |
| You received an unexpected call from Tom Dale about a sales opportunity. You need to complete an activity for the unscheduled phone call and schedule a follow-up meeting. |

There are several ways to complete an activity in Infor CRM SLX. The following method allows you to complete the activity, schedule a follow-up meeting, and carry over the notes.

#### To complete an unscheduled activity

1. Open Tom Dale's Contact Detail view.
2. On the **Schedule** menu, select **Complete an Activity**.
3. Select the **Create a New Unscheduled Activity to Complete** option.
4. Select **Phone Call**, and then click **Continue**.
5. In the **Regarding** box, click the drop-down arrow and select **Discuss Opportunities** from the list.
6. The **Completed** and **Scheduled** boxes automatically show the current date and time. You can accept the default, or select a new date and time.
7. In the **Notes** box, type **Tom Dale called about a possible sales opportunity.**

8. To schedule a follow-up activity
   a. Click the **Follow-up** drop-down arrow and select **Meeting**.
   b. Select **Carry Over Notes** to include your notes in the follow-up activity.
9. Click **Now** to complete the unscheduled activity.
10. In the **Schedule Meeting** dialog box, verify that the **Notes** field includes the notes from the phone call.
11. Select a date and time for the meeting, and then click **OK** to schedule the follow-up meeting

For more information see the "Completing an Activity" topic in the Infor CRM SLX Web Client Help.

# Inviting Others to a Meeting

When you schedule or edit a meeting or a phone call in the Infor CRM SLX Web Client, you can include other Infor CRM SLX users in the activity. These types of appointments appear on the Confirmations tab in your Activities view. You can accept or decline activities listed on the Confirmations tab. You may also receive an alert when you have an unconfirmed activity.

| Our scenario: |
|---|
| You want to invite a co-worker (from your company) to your meeting with Tom Dale (a contact for Beeker Motors). |

**To invite others to a meeting**

1. Open Tom Dale’s Contact Detail view.
2. Click the **Activities** tab.
3. In the list, open the meeting you scheduled in the previous scenario.
4. Click the **Availability** tab.
5. Click the **Add Members and Resources** button.
6. In the **Add Members and Resources** dialog box, use the lookup to find and select another Infor CRM SLX user, and then click **Add Selected**.
7. Click the **Add Members and Resources** button again.
8. In the **Add Members and Resources** dialog box, use the lookup to find and select a resource, such as a conference room, and then click **Add Selected**.
9. Use the Availability tab to make sure you, the other users, and the selected resource are available for the meeting.
10. Click **OK**.

The other user will receive an Alert to confirm the activity. After the user confirms or declines the meeting, you will receive a confirmation of the response.

For more information see the "Scheduling or Editing an Activity " topic in the Infor CRM SLX Web Client Help.

# Using the Calendar

Use the Calendar to manage your time and keep track of scheduled activities and events. The Infor CRM SLX Calendar displays both open and completed activities and events, depending on your calendar options. You can view your schedule by the day, week, or month view. Use the calendar right-click menu to schedule, edit, complete, or delete activities and events.

Your calendar security determines whose activities you can schedule, view, edit, complete or delete.

Depending on your access rights, you can view the calendars and activities of other Infor CRM SLX users. Each user has an assigned color to help identify which activities are for each user.

Some icons may not appear in week and month views due to limited space.

| **Our scenario:** |
| --- |
| You want to check your calendar to see if you have time available to meet with your co-worker before the meeting with Tom Dale. |

**To view the calendar**

1. On the Navigation Bar, click **Calendar**.
2. Select the type of calendar to view.
   - Day View - Displays a timeline for the day. Lists all scheduled activities and events for that day.
   - Work Week View - Displays only the days in your work week as defined in your user options. Lists scheduled activities and events for each day.
   - Week View- Displays each day in the selected week. Lists scheduled activities and events for each day.
   - Month View- Displays month calendar, listing scheduled activities for each day.
3. Each scheduled activity in the calendar is a link to the activity detail view. Double-click an activity to open the activity details. Rest your mouse over the activity to view its details. Click a link togo to the associated recor's detail view.
4. To view another user's calendar, select the user's name from the **Calendar Users** list.
5. To manage the users in the Calendar Users list, click Edit Calendar Users.
   The Edit Calendar Users screen opens.
   a. If necessary to filter the list, type the first couple of letters of a user's name in the **Find User** field and clickthe Search button to search for a user. The calendar security determines whose calendars you can view.
   b. Select the check boxes of the users you want to display in the Calendar Users list and clear the check boxes of the users you want to hide. The name is selected by default and cannot be cleared. You can select up to 25 users in the list. However you can view up to four calendars at a time.
   c. Click **OK**.
   The Calendar Users list includes only the selected users.

For more information see the "Using the Calendar" topic in the Infor CRM SLX Web Client Help.

# Using the Activities View

Use the Activities view to manage your scheduled activities, events, literature requests, and confirmations. If you have additional access rights, you can also view other Infor CRM SLX users' activities.

The tabs that appear in the Activities view are:

| | | |
|---|---|---|
| Alarms | All Open | Confirmations |
| My Activities | Past Due | Unconfirmed |

You can also create your own groups.

The following icons provide information about the activity:

| Icon | Description |
|---|---|
|  | Phone Call |
|  | Meeting |
|  | To-Do |
|  | Personal Activity |
|  | The activity is unconfirmed. (Not available on all tabs) |
|  | The activity has an attachment |
|  | The activity is a single occurrence of a recurring activity |
|  | The activity has an alarm |

| Our scenario: |
|---|
| You want to see how many phone calls you have tomorrow. |

**To view phone calls scheduled for tomorrow**

1. On the Navigation Bar, click **Activities**.
2. Click the **My Activities** tab.
3. Use the Task Pane **Filters** to narrow the list:
   - Expand the **Activity Type** filter and select **Phone Call**.
   - Expand the **Time Frame** filter and select **Tomorrow**.
     All of the calls you have scheduled for tomorrow are shown in the tab.
4. (Optional) You can click the activity type to view its detailed information and make any required changes

# Using the History List View

Use the History List view to manage your history, including completed activities, notes, literature requests, reports, emails, and database changes. If you have additional access rights, you can also view other Infor CRM SLX users' history.

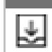
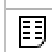
You can use groups and filters to narrow the list of records in the list. For example, if the time frame is the current month, use the Completed To Date filter to show only history items created this month to date.

The tabs that appear in the History List view are:

| | | |
|---|---|---|
| All History | Completed Activities | Database Changes |
| My Completed Activities | My Notes | |

You can also create your own groups.

The following icons provide information about the history item:

| Icon | Description |
|---|---|
|  | History item is a Database Change. |
|  | History item is a mail merge Document. |
|  | History item is a sent email. |
|  | History item is a fulfilled Literature Request. |
|  | History item is a completed Meeting. |
|  | History item is a completed Phone Call. |
|  | History item is a Note. |
|  | History item is a completed Personal Activity. |
|  | History item is a Report. |
|  | History item is a completed To-Do. |
|  | History item has an attachment. |

| Our scenario: |
|---|
| You want to see the phone calls and meetings you have completed this month. |

**To view phone calls and meetings you have completed this month**

1. On the Navigation Bar, click **History**.
2. Click the **My Completed Activities** tab.
3. Use the Task Pane **Filters** to narrow the list:
   - Expand the **History Type** filter and select **Meeting** and **Phone Call**.
   - Expand the **Time Frame** filter and select **Month To Date**.
     Only the meetings and phone calls you completed this month are shown in the tab.
4. (Optional) You can click the history type to view its detailed information and make any required changes

# Viewing a History of Interactions with an Account

When responding to scheduled or unscheduled activities, you may need to view the history of interactions with the contact and account or lead. For example, if a customer calls to ask a question she had from your last meeting, you can open the account history to view the meeting notes. The Notes/History tab contains all interactions, including full text notes, and provides filter options for viewing, e-mailing, and printing history items and notes.

| **Our scenario:** |
| --- |
| You want to review all the interactions you have had with anyone at Beeker Motors. |

**To view account history**

1. Go to Beeker Motors’ Account Detail view.
2. Click the **Notes/History tab**. If the tab is not visible, click the **More Tabs** tab.
3. If necessary, click the **Filter** button and use the filters to narrow the list of history items.
4. Click the **Type** link of the history item you want to view.

For more information see the "Notes/History Tab" topic in the Infor CRM SLX Web Client Help.

# Chapter 4
# Communicating with Contacts and Leads

This chapter gets you acquainted with additional methods of sending information to your contacts or leads such as proposals, letters, or memos by using the Infor CRM SLX Compose menu and Infor CRM SLX Mail Merge for Microsoft Word add-in. You can create and edit templates, letters, and other business correspondence. You can then use Mail Merge to merge your template with one or more leads, contacts or contacts related to one or more accounts, opportunities, sales orders, quotes, contracts, returns, or tickets.

Outlook Integration with Infor CRM SLX enables you to share information between Microsoft Outlook and Infor CRM SLX when you write e-mail messages, add contacts, and schedule meetings.

Outlook Integration features are now installed with Xbar. See "Understanding Infor CRM SLX Integration with Microsoft Outlook" on page 24.

In this chapter, you will learn to:

- Create a template
- Use Mail Merge to send information to contacts
- Work with Microsoft Outlook e-mail

## Working with Templates

You can use templates to create letters, proposals or e-mail messages that are used for more than one contact or lead. Templates use standard text that does not change, as well as mail merge fields that use Infor CRM SLX information that changes depending upon the contact or lead being merged.

### Infor CRM SLX Word Templates and Web Email Templates

When you install the Infor CRM SLX Mail Merge for Microsoft Word add-in, you can create, edit, or manage Infor CRM SLX mail merge Word templates from the Microsoft Word **Mailings** tab. To access these features, Microsoft Word must already be installed and configured and users must install the Infor CRM SLX Mail Merge for Microsoft Word on page 22. For more information see," Working with Word Templates" in the Web Client help.

In the Web Client you can select an existing template and perform a mail merge with the output to file or email. The templates used for output to email are created and managed in the Web Client while templates used for output to file can be created, edited, and managed in Microsoft Word. For more information see, "Working with Web Email Templates" in the Web Client help.

Mail Merge and template management are not available for all the users.

# Using the Mail Merge Word add-in

After you install the Infor CRM SLX Mail Merge for Microsoft Word add-in, in Microsoft Word from the Mailings tab, you can create, edit, or manage Infor CRM SLX mail merge Word templates and perform a mail merge to any Infor CRM SLX template managed in Word with the output to file, printer, or email.

To access these features, Microsoft Word must already be installed and configured and users must also install and configure the Infor CRM Mail Merge for Microsoft Word add-in. For more information, see "Understanding Infor CRM SLX Mail Merge for Microsoft Word" on page 22.

For more information about the Infor CRM SLX Mail Merge for Microsoft Word add-in, see the Infor CRM SLX Web Client help topic " Infor CRM SLX Mail Merge for Microsoft Word add-in" and the help topics available from help buttons on the Infor CRM SLX Mail Merge for Microsoft Word add-in views.

## Creating a New Template in Microsoft Word

These instructions help you create a new private Microsoft Word template.

| Our scenario: |
| --- |
| Tom Dale requested a pricing proposal for 150 motors. You need to create a new pricing proposal template. |

**To create a new template**

1. In Microsoft Word, open a blank document that you want to save as a new template, on the **Mailings** tab, click **Save as New Template**.
2. In the **Template Properties** dialog box, do the following:
   a. In the **Name** field, specify **Pricing Proposal**.
   b. In the **Family** field, select **My Templates**.
   c. In the **Main Table**, select **Contact**.
   d. In the **Owner** field, make sure your name is the owner.
   e. In the **Email Subject**, type the default subject you want to use if this template is sent as an email message. For this example, <Your company's> Pricing Proposal.
   f. Click **OK**.
3. In the empty document, type the text you want to include in the proposal template.
4. To add Infor CRM SLX merge fields to the template, place the cursor in the template where you want the merge field to appear, click **Insert Field**, then from the merge field list, select a field.
   The new merge field appears in the template.

# Performing a Mail Merge in Microsoft Word

These instructions help you create the merged document from your new template.

**To create the proposal for Tom Dale**

1. On the **Mailings** tab, click **Compose Mail Merge**.
2. If necessary, click the **Template** ellipsis button, expand **Private Templates**, expand **My Templates**, select **Pricing Proposal**, and then click **OK**.
3. Select the **Select Record** option, select **Contact** from the drop-down list, and then click the ellipsis button.
4. In the lookup search for **Tom Dale**, select the record in the list and then click **OK**.
5. Clear the **Enforce "Do Not Solicit"** option as Tom Dale requested this information.
6. Select the **Attach document to each record** option.
7. Click the **Select Address** drop-down arrow and select **Mailing**.
8. Click the **Output Type** drop-down arrow and select File.
9. Click the **Directory** ellipsis button and browse to the location where you want the merged file to be saved.
10. Click the **File format** drop-down arrow and select **PDF**.
11. Click the **History Options** tab and select the **Create history for each contact or lead** and **Add merged text to the history notes** options.
    a. For the **Result**, select **Complete**.
    b. For the **Regarding**, select **Send proposal**.
    c. In the **Notes** box type **Pricing proposal for 150 motors**.
12. Click the **Follow-Up Options** tab.
    a. Select the **Schedule a Follow-Up** option and select **Meeting** from the drop-down list.
    b. Select **Carry Over Note**s box to carry over your notes from the history item to the follow-up activity.
    c. Make sure the **Timeless** option is cleared and select a **Start Time** of next Monday at **9:00AM**, click the **Duration** drop-down arrow and select **1 hour**.
    d. Click the **Reminder** drop-down arrow and select 30 minutes.
    e. Make sure the **Leader** is set to you.
    f. Click the **Category** drop-down arrow and select **Follow-up**.
13. Click **Merge** to start the merge.

    The Mail Merge In Progress dialog box shows the progress of the merge.
14. When finished, click **OK** to close the dialog box.

    Windows Explorer opens to the Directory specified in step 14 with the merged document selected.
15. Double-click the merged document to open and view the pricing proposal.

# Using Mail Merge in the Web Client

You can use Mail Merge in the Web Client when you need to correspond with a group of contacts or leads. Mail Merge helps you simplify the process of sending the same information to numerous people by merging information into a template. You can perform a mail merge output to file or email.

Each output type supports a different type of template:

- Output to file uses Word-based templates that are also used in Infor CRM SLX Mail Merge for Microsoft Word. See the Web Client help topic "Working with Word Templates". Selecting a Word email template saves the file locally. It is not possible to email a Word template from the Web Client.
- Output to email uses email templates that are created and managed in the Web Client. See the Web Client help topic "Working with Web Email Templates". Performing an email mail merge with a Word template is only supported in Microsoft Word.

For more information see the Web Client help topic "Using Mail Merge in the Web Client".

## Creating a New Email Template in the Web Client

These instructions help you create a new Email template.

| Our scenario: |
| --- |
| You need to create a email template to thank customers for allowing you to demonstrate your product. |

**To create a new email template**

1. On the **Compose** menu, click **New Email Template**.
   The Insert Email Template page is displayed.
2. In the **Name** box type **Thank You - Demo**.
   This is the name of the template that displays when selecting an email template.
3. In the **Description** box type **Thank you email after demo**.
   This is a brief description of the email template content or suggested use.
4. Click the **Contact/Lead** drop-down arrow and select **Contact**.
   The properties available for contact templates are different than the properties available for leads, therefore it is important to have separate templates designated for contacts and leads.
5. Click **Save**.
6. In the **Email Template** detail view, click in the **Body** section, you can type and format text and add SLXfields using the @mention user interface.
   For this example, type:
   Dear @PreferredName,
   Thank you so much for allowing us to present a solution to @Contact.Account. We feel that, together with your team, we have identified @Contact.Account's PC needs and recommended a package that will provide great performance and reliability for your staff.
   Please let us know if you have any outstanding questions at all. We are working on your proposal and will have that to you shortly.
   Thank you again for your time!
   @Username
   @Title
   @UserCompany
   @Userinfo.Phone

## Mail Merge to Email in the Web Client

These instructions help you create a new Email template.

| Our scenario: |
|---|
| You recently provided a demonstration for upgrading all of your contacts at Beeker Motors, and want to send an email letter thanking them for their time. You want to run a mail merge to send the information to all contacts at once.. |

#### To send an e-mail using Mail Merge

1. On the **Compose** menu, click **Mail Merge**.
   The Mail Merge dialog box is displayed.
2. On the **Merge With** tab, click the **Entity Type** drop-down arrow, select **Account**, and the click the **Lookup** icon.
3. In the Lookup, specify **Be**, click **Search**, and then double-click **Beeker Motors** in the list.
4. **Click the Output Type drop-down arrow and select Email.**
5. Click the **Template** button, and begin typing **Thank you**.
6. Select **Thank you - Demo** from the list and click **OK**.
7. Leave the **Primary contact only** and **Enforce "Do not solicit"** options selected.
8. Select the **Attach document** to each record option.
9. Click in the **Subject** box and type **Thank You**.
10. Select the **Send emails to the contact/lead email address** option to use the email addresses defined for each contact in Infor CRM SLX. Selecting this option makes the Recipients box unavailable.
11. In the **CC** box, type @ and then type the name of an Infor CRM SLX user, team, or department to send the email to additional people in your organization. Or type the email address of someone who is not an Infor CRM SLX user, contact, or lead.
12. Click the **History Options** tab.
13. Make sure the **Create history record for each contact or lead** option is selected.
14. Click the **Regarding** drop-down arrow and select **Send e-mail message**.
15. Click the **Follow-Up Options** tab.
16. Select the **Schedule a Follow-Up** option, click the drop-down arrow and select **Phone Call**.
17. Clear the **Schedule separate follow-up activity for each contact** option, as you want to schedule a single phone call with all contacts as attendees.
18. Select a **Start Time** of next Thursday at **10:00AM**, click the **Duration** drop-down arrow and select 1 hour.
19. Click the **Reminder** drop-down arrow and select **30 minutes**.
20. Make sure the **Leader** is set to you.
21. Click the **Category** drop-down arrow and select **Follow-up**.
22. Click **OK**.

    The merged emails are sent to all recipients and history records are added for each contacts. For more information see the "Using Mail Merge in the Web Client" topic in the Infor CRM SLX Web Client Help.

# Outlook Integration

Outlook Integration features are now installed with Infor CRM Xbar for Microsoft Outlook.

If your company uses Outlook Integration, you can save Outlook e-mail messages as Infor CRM SLX history items. For example, you can:

- Compose an e-mail message in Outlook, select contacts from the Infor CRM SLX Address Book, and then click Send to CRM to record the e-mail body and any attachments to the associated record. You can also include attachments to the message.
- Select an e-mail message in Outlook, and then click Record to History to record the e-mail body and any attachments to the associated record.
- Send an Infor CRM SLX contact's information in a vCard file format via e-mail.
- Attach documents from Infor CRM SLX Library to a message in Outlook.
- Drag and drop e-mail messages from Outlook to the Infor CRM SLX History tab.
- Click the E-mail button on the Contact or Lead Detail view to open a new e-mail message addressed to that lead or contact.
- Click the E-mail button on the Ticket Detail view to copy ticket information into a new e-mail message, and then click Send to CRM in Microsoft Outlook to send the message and save it to Infor CRM SLX.

For more information see the following topics in the Infor CRM SLX Web Client Help:

- "E-mailing a Contact or Lead"
- "E-mailing a Contact"
- "Installing and Using Infor CRM SLX Desktop Integration"
- "Sending an E-mail Message from a Ticket"

## Sending email to multiple records using Outlook Integration

| **Our scenario:** |
| --- |
| You want to send an e-mail to Tom Dale and Joan Smith of Beeker Motors to tell them that you will be out of the office for a few days. You can use Microsoft Outlook and record the e-mail message in Infor CRM SLX. |

### To send an e-mail to multiple records using Outlook Integration

1. On the Navigation Bar, click **Contacts**.
2. Use the Lookup to find the contacts you want to e-mail.
   a. Click the Lookup tab (magnifying glass).
   b. In the first box select **Account**, in the second box select **Starting With**, in the third box type **Be**, and then click **Search**.
3. Select **Tom Dale** and **Joan Smith**.
   To select more than one record, hold down [Ctrl] or [Shift], and highlight the records.
4. From the Task Pane, under **Common Tasks**, select **E-mail**.
5. If the **Select Names** dialog box opens, select both names and click the **To** button, and then click **OK**.

6. If e-mail is enabled, but you have not logged on, at the message box, click **Yes** to log on.
7. In the **Subject** line, type **Out of Office**.
8. In the Body area, type **I will be out of the office for a few days. I'll contact you when I return.**
   Since you are using Outlook to send this e-mail message, you may want to record this to Infor CRM SLX History.
9. Click the **Send to CRM** button.

# Chapter 5
# Managing Opportunities for Sales

Opportunities are potential sales to accounts and contacts. As an opportunity progresses, you can track the products involved in the opportunity, days in the pipeline, competitors, level of commitment by the prospect, and much more.

In this chapter, you will learn to:

- Add an opportunity
- Use Opportunity Statistics
- Close an opportunity

## Adding a New Opportunity

Use the Insert Opportunity view to enter opportunity information and to add competitors or contacts. You can also update the opportunity currency and rate if you have Multi-Currency enabled.

If you frequently use the same settings when adding opportunities, you can set default values.To set the default values for opportunities, go to **Tools > Options** and select the **Opportunities** tab. For more information see the "Setting Opportunity Options" topic in the Infor CRM SLX Web Client Help.

It is not necessary to complete all information when you add an opportunity. You can add the information that is most important to your company when you add the opportunity, and then update the Opportunity Detail view with more information later. For example, when you add an opportunity, you may want to note the probability of closing the sale, the dollar amount, and the estimated close date. Then add information as the opportunity moves through the pipeline.

- You can add products to the opportunity after it is created using the Products tab in the Opportunity Detail view.
- Adding contacts to an opportunity allows you to target the individuals at the account and designate their roles and influence in the possible sale. If you do not add contacts while adding the new opportunity, you can add them later using the Contacts tab in the Opportunity Detail view.

| **Our scenario:** |
|---|
| There is an opportunity for a sale of 10 printers to Beeker Motors. You want to create a new opportunity and add contacts and products. |

**To add a new opportunity**

1. Open the Beeker Motors' Account Detail view.
2. On the **New** menu, click **Opportunity**.
3. Complete the following information:
   Based on your Opportunities options, some boxes may already be completed.

- **Description** - Enter a name for the opportunity.
  To help track opportunities, use the account name in the opportunity description.
- **Account** - Verify the account is **Beeker Motors**.
- **Account Manager** - Click the **Find** button to find the person or team within your organization who manages the account.
- **Add To Forecast** - Select if you want to include the opportunity in forecast calculations or clear the checkbox to exclude it from forecasts.
- **Type** - Click the drop-down arrow, and select **New**.
- **Lead Source** - Click the drop-down arrow and and select **Trade Show - General**.
- **Status** - Your company defines the opportunity status list. Click the drop-down arrow, and select a status from the list.
- **Estimated Close** - Click the **Calendar** button, select the date that the opportunity is estimated to close, and then click **OK**.
- **Close Probability** - Click the drop-down arrow, and then select the probability that this opportunity will be closed from the list.

4. Add the opportunity contacts.
   a. In the **Contacts** section, click the **Include Contact** button.
   b. From the lookup, select **Joan Smith** and **Tom Dale**, click **Add Selected**, and then click **Close**.From the lookup, select **Joan Smith** and **Tom Dale**, click **Add Selected**, and then click **Close**
5. Click **Save**.
   The opportunity detail view of the newly added opportunity opens.
6. Add the opportunity products.
   a. On the Opportunity detail view, click the **Products** tab and click the **Include Product** button.
   b. From the lookup, select **NetPrinter Laser Elite**, click **Add Selected**, and then click **Close**.
   c. In the grid, click the **Quantity** column and change **1** to **10**.

# Using Opportunity Statistics

You can use Opportunity Statistics to view opportunity information at a glance. You can view opportunity statistics for a group of opportunities, or you can select individual opportunities from the Opportunity List view.

### To open Opportunity Statistics

1. On the Navigation Bar, click the **Opportunities** button.
2. In the Opportunities List view, open the group of opportunities you want to view.
   You can open the opportunity group using the Opportunity Group list.
3. Select the records you want to view, and do one of the following:

   If you do not select any records the statistics will be based on all records in the group. If prompted click Yes to view statistics based on all records in the group, click No to cancel.

   - Right-click and select **Opportunity Statistics**.
   - In the Task Pane, under **Common Tasks**, click **Opportunity Statistics**. If prompted,
4. When finished, click **Close**.

# Closing an Opportunity

When an opportunity is won or lost, you should close the opportunity. For future reference and reporting purposes, you should provide the reason for closing the opportunity.

| **Our scenario:** |
| --- |
| Beeker Motors has agreed to your terms and pricing and now you may close the opportunity. |

**To close an opportunity**

1. Open the Beeker Motor's opportunity in the Opportunity Detail view.
2. In the **Status** box, click the drop-down arrow, and select **Closed-Won** from the list.
   The Close Opportunity dialog box opens.
3. In the **Actual Amount** box, verify the amount of the sale is listed.
4. If necessary, modify the **Actual Close** date. To modify the date, click the **Calendar** button, select a new date, and then click **OK**.
5. In the **Reason Won** box, click the **ellipsis** button, select an item or items from the list, and then click **OK**.
6. In the **Comments** box, type **Delivery must be complete by the end of the financial quarter**.
7. Click **OK**.
   Beeker Motors' Opportunity Detail view appears with a Closed-Won Status and the Probability automatically updates to 100%.

## Assigning a Serial Number to an Asset

**To add an asset to an account**

1. Click the **Beeker Motors** link.
2. Click the **Assets** tab. If the tab is not visible, click the **More Tabs** tab.
3. Click the **Add Asset** button.
4. In the **Add Asset** dialog box, click the **Name Find** button.
5. From the lookup, search for and select **NetPrinter Laser Elite**, and then click **OK**.
6. In the **Quantity** box, type **10**.
7. In the **Serial Number** box, type **BMNPLE001**.
8. Click **OK**.
   The asset appears in the product list for that account.

# Chapter 6
# Managing Leads and Campaigns

This chapter is an introduction to Infor CRM SLX Marketing. With Infor CRM SLX Marketing you can develop and qualify new sales leads, convert leads in into customer in a structures process, and create and manage sales campaigns while tracking their effectiveness.

In this chapter, you will learn to:

- Add leads to Infor CRM SLX
- Import leads to Infor CRM SLX
- Qualify a lead
- Add a campaign
- Add targets to a campaign
- Add stages and tasks to a campaign
- Add products to a campaign
- Launch a campaign
- Track campaign responses

## Working with Leads

Leads are unqualified potential customers. Use lead qualification criteria to determine if a lead has valid information, already exists as a lead or contact, or is ready to be converted to a sales opportunity. Once qualified, a lead can be converted to or merged with a contact and account. You can also create a new sales opportunity.

### Adding a Lead

There are many ways in which your company can acquire leads. They may buy lead lists, acquire another company's customers, or find a single lead while maintaining current accounts. If you have multiple leads, importing the information to Infor CRM SLX is the most efficient method. However, if you cannot import lead information, you must manually add the lead (s) to Infor CRM SLX.

| Our scenario: |
| --- |
| While you were speaking to a current contact, he mentioned his friend Bob Green may be interested in purchasing some software. You need to add Bob Green to Infor CRM SLX as an unqualified lead. |

**To add**

1. On the **New** menu, click **Lead**.
2. In the **Name** box, type **Bob Green**.

3. In the **E-mail** box, type **bob.green@greendentist.mail**.
4. In the **Company** box, type **Green Dentistry**.
5. In the **Phone** box, type **5553211234**.
6. Click **Look for Matching Records** to search the database for leads, contacts and accounts that have matching information.
   The Matching Leads dialog box appears. If a matching record displays in this dialog box, you can open the matching record to see if the lead, contact, or account is the same as the lead you are entering.
7. In the **Matching Leads** dialog box, no matches were found so click **Cancel**.
8. In the **Title** box, select or type **Managing Director**.
9. Click the **Lead Source** drop-down arrow and select **Word of Mouth/Referral**.
10. In the **Industry** box, click the drop-down arrow, select **Healthcare/Medical/Pharmaceutical**, and then click **OK**.
11. In the **Interested In** box, type **accounting software**.
12. Click **Save**.

## Importing Leads

Your company may purchase mailing lists or have a large number of potential customers that must be tracked in Infor CRM SLX. Rather than adding leads one at a time, you can import large numbers of leads to Infor CRM SLX quickly and easily.

Use the Import Leads view to import lists of leads into Infor CRM SLX. You may only import leads from a comma-separated-values (CSV) list. Valid file types include Microsoft Excel, .txt files, and other database file types, but files must be saved as a CSV file.

| **Our scenario:** |
|---|
| Your manager has given you a file containing 200 leads. You want to import the leads into Infor CRM SLX so that you can begin calling them. |

**To import leads**

1. From the **Tools** menu, click **Import Leads**.
2. Next to the **Select a file containing Leads information to start** box, click **Browse**, browse to the list you want to import, and then click **Open**.
3. Click the **Default Owner Find** button to select the person or team within your organization that will own the imported leads.
4. Click the **Default Lead Source Find** button and select **Purchased List - General**.
5. Make sure **Create a new ad hoc group** is selected.
6. Click **Next**.
   The wizard moves to Step 2, Define Delimiter.
7. Preview the records before they are imported. If necessary, select a different delimiter value, for example a comma, semicolon, or text qualifier.

   For more information see the “Defining a Delimiter” topic in the Infor CRM SLX Web Client Help.

8. Click **Next**.
9. Match the lead list fields and Infor CRM SLX lead fields. If you want to display all of the fields in both lists and any template, select **Show All Fields**.

a. Select the external list field and Infor CRM SLX field to be matched.

b. Click **Match**.
   Matched Infor CRM SLX fields display in the Matched Infor CRM SLX Field column.

10. Repeat the previous step for each field that needs to be matched.

11. Click **Next**.
    The wizard moves to Step 4, Manage Duplicates.

12. Complete the Manage Duplicates information.

    a. Select **Check for duplicate leads**.

    b. Next to **Type**, select **Contact** and **Lead** make sure records do not already exist as a contact or lead.

    c. Under **Match Filters**, select the filter check boxes that you want to apply. For example, First Name, Last Name, Work Phone, E-mail, Account/Company.

    d. For this scenario, clear the Auto-merge duplicate records option.

    For more information see the “Rules for Automatically Merging Records During Import” topic in the Infor CRM SLX Web Client Help.

    e. If you want to check for duplicate records within the import source file, select the **Check for duplicates contained within the import source file** option.

    f. Click **Run the Test** to run the Find Duplicates Test on the first 100 records in the import or all of the records if you selected the previous option.

    For more information see the “Managing Duplicate Records” topic in the Infor CRM SLX Web Client Help.

13. Click **Next**.
    The wizard moves to Step 5, Select Import Actions.

14. Complete the Select Import Actions information.
    Use import actions to specify actions to be performed for the leads you import to Infor CRM SLX.

    a. Next to the **Add Note** action, click **Define**.

    b. In the **Add Note** dialog, select **Timeless**, and in the **Notes** box type **This record was imported from a list**.

    c. Click **Save**.

    For more information see the “Selecting Import Group Actions” topic in the Infor CRM SLX Web Client Help.

15. Click **Next**.
    The wizard moves to Step 6, Review.

16. Review the import selections and click **Submit**.
    The wizard moves to Step 7, Process Request.

17. When the import is finished, click the **Import Number** link to see the import history results in the Import History view.

## Qualifying a Lead

A lead may contain unqualified information. You can use lead qualification criteria to validate information and determine if the lead is a sales opportunity. Once qualified, you can convert a lead to a contact and account and create a new sales opportunity.

| Our scenario: |
| --- |
| You spoke to Bob Green on the phone and he has decided to order from your company. You need to add the information regarding Bob's purchase and convert him to a qualified lead. |

If your Qualification criteria was customized by your administrator, the items you see in your workspace may be different.

### To qualify a lead

1. Click the **Leads** button on the Navigation bar.
2. Click the Lookup tab (magnifying glass).
3. Use the **Lead** lookup dialog box to find Bob Green:
   a. In the Lookup by box, select **Name**.
   b. In the next box, select **Starting with**.
   c. In the third box, type **green**, and then click **Search**.
4. In the list, click **Green, Bob**.
5. In the **Qualification** box, click the drop-down arrow, and then click **Lead**.
6. Under **Qualification**:
   a. Select the **Valid Contact** check box.
   b. Select the **Budget for purchase** check box, and then in the corresponding text box type **15000**.
   c. Select the **Timeframe for purchase** check box, and then in the corresponding text box type **3 months**.
   d. Select the **Business need identified** check box, and then in the corresponding text box type **accounting software**.
   e. Select the **Decision maker identified** check box, and then in the corresponding text box type **Bob Green**.
7. Once the lead is qualified and ready to convert to a contact and account, click the **Convert Qualified Lead** button.
8. In the **Convert Lead** dialog box, verify that no existing contacts or accounts match the lead you are qualifying.
9. Click **Convert**.

# Working with Campaigns

A campaign is a combination of various advertising, public relations, sales promotion, and selling activities used over a period of time to achieve predetermined sales or marketing goals. A campaign can target a specific industry or group. Infor CRM SLX Marketing allows you to track information such as the time frame of the campaign, products associated with the campaign, response rates for a campaign, and more.

## Adding a Campaign

After you have determined what type of campaign your company plans to use, you can add the information to Infor CRM SLX.

| Our scenario: |
| --- |
| Your company has decided to run a return mail advertisement campaign to all leads and contacts in the state of Illinois. You need to add the campaign information to Infor CRM SLX. This includes the campaign targets, stages, and tasks that must be completed during the campaign. |

**To add a campaign**

1. On the **New** menu, click **Campaign**.
   The Insert Campaign dialog box appears.
2. In the **Campaign Name** box, type **IL Return Mail Ad Q4 FY2025**.
3. In the **Description** box, type **Return mail advertisement for IL - Fall 2025**.
4. In the **Objective** box, type **Promote PC v7**.
   In this scenario, the objective of the campaign is to promote the new version of Pocket PC.
5. In the **Call to Action** box, type **Pre-register and save 10%**.
6. In the **Lead Sources** box, click the **Find** button, and next to **Advertising - General**, click **Associate**.
7. In the **Status** box, select **Setup**.
8. In the **Code** box, type **RMAdQ42025**.
   The code is a unique identifier for this campaign.
9. In the **Start Date** box, type or select next Monday’s date.
10. In the **End Date** box, select a date 3 months in the future.
11. In the **Manager** box, click the **Find** button, select your name, and then click **OK**.
12. Leave the **Owner** as **Everyone**.
13. Click Save.

## Adding Targets to a Campaign

When you identify your targets, you isolate the contacts, accounts, and/or leads on which to focus your marketing efforts. Effectively targeting your audience allows you to make the most of your marketing campaign by spending time and money on a segment of the market most likely to purchase from your company.

**To add targets to a campaign**

1. On the Navigation Bar, click **Campaigns**.
2. Open the **IL Return Mail Ad Q1 FY2025** campaign in the Campaign Detail view.

3. Click the **Targets** tab.
4. Click the **Add Targets** icon.
5. Use the filters to narrow the list of records.
   a. Select **Accounts (all Contacts)**.
   b. Select the **State** check box, select **Starting with** in the drop-down box, and then type **IL** in the text box.
6. To find out how many targets meet the filter criteria before searching, click the **How Many?** button.
7. Click **Search**.
8. Click the **Add Targets** button to add all the targets in the list and close the dialog box.
   The targets appear in the Targets tab grid.

## Adding Campaign Stages and Tasks

### To add a stage to a campaign

1. Open the **IL Return Mail Ad Q4 FY2025** campaign in the Campaign Detail view.
2. From the **Campaign** Detail view, select the **Stages/Tasks** tab, and then click **Add Stage** + .
3. In the **Description** box, type **Prepare ad slick**.
4. In the **Status** box, click the drop-down arrow, and select **In Progress**.
5. In the **Comments** box, type **Used in-house ad department. Updated campaign previously targeted to state of CA.**
6. In the **Start Date** box, select today's date.
7. In the **End Date** box, select a date one week from today.
8. Click **OK**.

Campaign tasks can help Infor CRM SLX Marketing users manage their campaigns. You can add and edit task information, or complete a task once it is finished.

### To add tasks to a campaign

1. In the **Campaign Detail** view, on the **Stages/Tasks** tab, click **Add Task** next to the appropriate campaign stage.
2. In the **Description** box, type **Update CA ad slick from FY2011 Q4 campaign**.
3. In the **Status** box, click the drop-down arrow and select **Completed**.
4. In the **Priority** box, click the drop-down arrow and select an item from the list.
5. In the **% Complete** box, type **100**.
6. In the **Needed Date** box, select yesterday's date.
7. In the **Assign to** section, select **Other Individual**.
8. In the **Assign To** box, type **Advertising Dept - Tom**.
9. Click **OK**.
10. To add another task, click **Add Task** next to the campaign.
11. In the **Description** box, type **Print new ad slick**.
12. In the **Status** box, click the drop-down arrow, and then select **In Progress**.
13. In the **Needed Date**, select a date 6 days from today.

14. In the **Assign to** section, select **Other Individual**.
15. In the **Assign To** box, type **Print Vendor**.
16. Click **OK**.

## Adding Products to a Campaign

Products are the goods and/or services that you are selling in a campaign. You can add products to a campaign when you add the campaign information to Infor CRM SLX, or you can add or change product information for an existing campaign.

| Our scenario: |
| --- |
| Management wants to add an incentive to the campaign. You need to add additional products to the direct mail campaign. |

**To add products to an existing campaign**

1. Open the **IL Return Mail Ad Q4 FY2025** campaign in the Campaign Detail view.
2. Click the **Products** tab. If the tab is not visible, click the **More Tabs** tab.
3. Click the **Associate Products** button.
4. Select **GoStore 200GB** and **Kiva Big Mouth Briefcase**, and then click **Add Selected**.

## Launching a Campaign

When all campaign information has been added to Infor CRM SLX, you are ready to launch the campaign. Launching the campaign allows Infor CRM SLX to begin tracking information used in reports, budgets, and so on.

When a campaign is launched, the campaign target contacts and leads are assigned to the first stage of a campaign and their status is changed to "Launched".

| Our scenario: |
| --- |
| After verifying all the campaign steps and information, you want to launch the campaign. |

**To launch a campaign**

1. Open the **IL Return Mail Ad Q4 FY2025** campaign in the Campaign Detail view.
2. Verify all the information is correct.
3. Click **Launch**.

## Tracking Campaign Responses

After you launch a campaign, you can begin to track the responses associated with the campaign. Campaign responses include who responded, the date, the response method, any notes, and so on. You can track responses during various stages of the campaign. Adding this information correctly helps your company to identify successful campaigns and stages to aid in refining and running successful campaigns in the future.

Campaign responses can be added and viewed in the Infor CRM SLX Web Client Client.

| Our scenario: |
| --- |
| You need to add a response for a recent campaign. The individual has decided to purchase from your company. |

#### To add and view campaign responses

1. Open the **IL Return Mail Ad Q4 FY2025** campaign in the Campaign Detail view.
2. Click the **Responses** tab.
3. Click the **Add Campaign Response** button.
4. Select **Contact**, click the **Contact Find** button, type **st**, click the **Search** button, select the first name in the list, and then click **OK**.
5. Click the **Response Method** drop-down arrow and select **Phone**.
6. In the **Comments** box, type **Responded within 5 days. Qualifies for 10% discount and free carrying case**.
7. In the **Products** section, click **Add Product**, click **Search**, select **Kiva Big Mouth Briefcase**, and then click **OK**.
8. Click **OK**.

# Chapter 7
# Working with Customer Service and Support

This chapter introduces you to the Infor CRM SLX Customer Service and Support features. The Customer Service and Support features allow designated users to track, qualify, and resolve customer questions and issues.

In this chapter, you will learn how to:

- Understand and work with contracts
- Add, work in, and close tickets
- Add and close a return
- Add and close a defect

## Working with Contracts

Contracts are agreements between accounts and your company to provide support for products sold. Infor CRM SLX has five general types of contracts that cover support services. In addition, a contract can cover a specific set of products, or it can be a “blanket” contract that covers all products the account owns. You can use contracts to verify that support should be provided to specific accounts for specific products.

### Understanding Contract Types

The five default contract types are:

| Type | Description |
|---|---|
| Days | The contract is tracked according to a number of days of services the account has purchased. This value is entered into the Quantity box for the contract. When the contract type is Days, and as activities are generated for the account, the value in the Remaining box will not decrement. |
| Hours | The contract is tracked according to a number of hours of services the account has purchased. This value is entered in the Quantity box for the contract. The total time is calculated using the Elapsed Hours value for all activities generated for the account. As activities are generated, the value in the Remaining box decreases to reflect the number of hours left on the contract |
| Incidents | The contract is tracked according to the number of service calls the account has purchased. This value is entered into the Quantity box for the contract. The total number of incidents reflects the total number of tickets the account has opened. As tickets are opened, the value in the Remaining box decreases to reflect the number of incidents left on the contract. |

| Type | Description |
|---|---|
| Value | The contract is tracked according to a currency value placed on the services the account has purchased. This value is entered into the List Price or Contract Amount box for the contract. When a ticket activity is created against the contract, the activity's Total value is charged against the contract amount, and the value in the Remaining box decreases to reflect the value left on the contract. |
| Perpetual | The contract has no limit. The account can open an unlimited number of tickets and activities for an unlimited amount of time. |

To ensure that the time, number of incidents, or currency value left on a contract is tracked accurately, you must activate the contract before beginning work on a ticket.

## Adding a Contract

Each contract you add must be connected with an account that already exists in Infor CRM SLX. The following scenario explains how to create a contract for an account.

| Our scenario: |
|---|
| Tom Dale calls to request a new contract. He wants a one year contract that covers up to 10 incidents. |

**To add a contract**

1. Open the **Beeker Motors** Account Detail view and select the **Contracts** tab. If the tab is not visible, click the **More Tabs** tab.
2. Click the **Create Contract** button.
3. Complete the contract information boxes.
   a. In the **Reference #**, type a reference number for the contract.
   b. Verify that **Dale, Tom** is listed in the **Contact** box. If not, click the **Find** button and select **Tom Dale** from the lookup.
   c. Select **Active**.
   d. In the **Comments** box, type **New 1 year contract for 10 incidents. Qualifies for new customer discount.**
   e. Click the **Service** drop-down arrow and select **Classic Care Ultra** from the list.
   f. Click the **Contract Type** drop-down arrow and select **Incidents** from the list.
   g. Leave the **Start Date** as today's date.
   h. Type a purchase order number in the **PO Number** box.
   i. In the **Purchase Date** box, select today's date.
   j. In the **List Price**, type **500.00**.
   k. In the **Discount** box, type **50.00** because he qualifies for a new customer discount.
   The Contract Amount is automatically calculated
   l. Click the **Expiration Calendar** button and select the date one year from today.
   m. In the **Quantity** box, type **10**. This specifies that the contract covers 10 incidents in the next year.
4. Click **Save**.
5. Associate Beeker Motors assets to the contract.
   a. On the Contract detail view, click the **Covered Assets** tab. If the tab is not visible, click the **More Tabs** tab.
   b. Click the **Associate Asset** button.
   c. In the lookup select **NetPrinter Laser Elite**, and then click **Add Selected**.

# Working with Tickets

Tickets are records of customer inquiries or complaints. They can contain the information necessary to report, investigate, and close an inquiry or problem. Before you add a ticket, the account and contact must exist in Infor CRM SLX.

## Adding a Ticket

| **Our scenario:** |
| --- |
| Tom Dale at Beeker Motors called. He is having a problem with one of their printers and needs the problem resolved by the end of the week. You need to create a ticket to work on the problem. |

**To add a ticket**

1. Open Tom Dale's Contact Detail view.
2. On the **New** menu, click **Ticket**.
3. In the **Insert Ticket** view, verify **Beeker Motors** appears in the **Account Name** box.
4. If necessary, in the **Contact Name** box, click the **Find** button, and then select **Tom Dale**.
5. In the **Contract** box, click the **Find** button, use the **Lookup Contract** to select the contract you created in the previous scenario, and then click **OK**.
6. In the **Source** box, click the drop-down arrow, and then select **Phone**.
7. In the **Area** box, click the **Find** button and in the **Area** list select **Hardware**.
   Options available for Hardware appear in the Category list.
8. In the **Category** list, select **Printer**.
9. In the **Issue** list, select **Power**, and then click **OK**.
10. In the **Status** box, click the drop-down arrow, and then select **In Process**.
11. Click the **Urgency** drop-down arrow, and then select **Med-High**.
12. In the **Needed Date** box, use the **Calendar** button to select a date at the end of the week.
13. Verify the **Assigned To** box lists your name. If necessary, click the **Find** button and select your name from the list.
14. In the **Subject** box, type a short summary of the problem.
15. In the **Description** box, click the **Add problem timestamp** button, and then type detailed information for the problem.
16. Under **Comments**, in the **Internal** box, click the **User Date Stamp** button, and then type additional information that is important to the ticket.
17. Click **Save**.

## Adding Ticket Activities

Ticket Activities are added through the Ticket Activities tab on the Ticket Detail view. Ticket Activities enable you to track the time, the types of tasks, and any associated costs involved in resolving a ticket. Activities are recorded by activity type and charge rate and are used for billing the customer against their service contracts. You can add your own ticket activities at any time from the Ticket Activities tab.

| **Our scenario:** |
| --- |
| You told Tom Dale that you will research his problem and call him back. You need to add a ticket activity for the research time. |

**To add a ticket activity**

1. Open Tom Dale's ticket.
2. Click the **Ticket Activities** tab. If the tab is not visible, click the **More Tabs** tab.
3. On the **Ticket Activities** tab, click **Advanced**.
   The Insert Ticket Activity view opens.
4. In the **Public Access** box, click the drop-down arrow and select **1-Customer**.
   This setting determines whether customers will be able to see the ticket activity using Infor CRM Customer Portal.
5. Select the **Follow Up** option if the ticket activity requires further action. If this check box is selected, the ticket is added to the Follow-Up group in the Ticket List view.
6. In the **Type** box, click the drop-down arrow, and then select **Research**.
7. Verify that the **Start Date** box displays the correct start date and time for the activity. If not, click the **Calendar** button to specify the correct date and time.
8. Since you have not yet completed the activity, skip the **End Date** box. When you complete the activity, you will use the **Calendar** button to select the date and time you finished working on the activity.
   It is very important that you select accurate dates and times in both the Start Date and End Date boxes because this information is used to calculate the Time Units, Elapsed Hours, Rate, and Total Labor.
9. Click the **Due Date Calendar** button to specify the correct date and time.
10. Verify that the **User** box displays your name. If not, click the **Find** button to locate your name or the name of the individual who will be responsible for completing the activity.
11. (If necessary) In the **Charge Type** box, click the **Find** button, select **No Charge**,and then click **OK**.
    The charge type is the rate your company charges against the customer's support contract for the work you performed.
12. In the **Comments** box, type **Research printer power issues.**
13. Click **Save**

For more information see the "Adding and Editing Ticket Activities" topic in the Infor CRM SLX Web Client Help.

## Punching In and Out of a Ticket

The Punch In and Punch Out function enables you to track the time spent assisting a customer for each ticket. When you click the Punch In button on a ticket's detail view, Infor CRM SLX begins timing the activity. When you are finished, you can click Punch Out. Infor CRM SLX stops timing the activity and adds an activity record to the Ticket Activities tab for the ticket.

When you use the Punch In/Punch Out feature in a ticket, a timed activity is automatically created.

| Our scenario: |
| --- |
| Tom Dale calls with more information on his printer problem. You need to open the ticket and track the time you spend talking to him and gathering information. |

**To punch in to and out of a ticket**

1. From the **Beeker Motors** Account Detail view, click the **Tickets** tab, and click the ticket’s **Ticket ID** number.
2. Click the **Punch In** button.
   The button text changes to Punch Out, and Infor CRM SLX begins recording time against the ticket activity.
3. Click the **Ticket Activities** tab. If the tab is not visible, click the **More Tabs** tab.
4. From the list of ticket activities, click **Edit** next to the **Timed** activity you want to change.
5. Enter the information from your conversation with Tom Dale in the **Comments**.
6. Click **Save**.
7. When you are finished working on the ticket, click **Punch Out** to stop tracking time on the ticket.

## Closing a Ticket

The stage at which a ticket is closed and the person responsible for closing a ticket depend on your company’s processes.

| Our scenario: |
| --- |
| You resolved the problem with Tom Dale’s printer and completed all follow-up activities. Now you want to close the ticket. |

**To close a ticket**

1. Open Tom Dale's ticket.
2. Ensure all ticket information is complete and accurate.
3. Close any open ticket activities.
   a. Click the **Ticket Activities** tab.
   b. Click **Edit** next to the **Research** activity.
   c. Click the **End Date Calendar** button, select a date, and then click **OK**.
   d. Click **Save**.
4. In the **Status** box, click the drop-down arrow, select **Closed**, and then click **OK**.
5. Click the **Details** tab and update the **Resolution**.
   a. Click the **Date/Timestamp** button.
   b. Type **Printer overheats and turns off due to faulty fan**.

6. If you want to submit the resolution information to be accepted into the SpeedSearch indexes, select the **Submit for SpeedSearch** check box in the top pane.
7. Click **Save**.

# Working with Returns

Returns are agreements to accept returned products from a customer for service, replacement, refund, or credit. This may also be referred to as an RMA or Return Materials Authorization.

## Adding a Return

Every return must be associated to a ticket. Before you add a return, ensure that the related ticket exists. If necessary, create the ticket before proceeding.

| Our scenario: |
| --- |
| Tom Dale reported a problem with a printer and sent it in for repairs. After researching the ticket, you determined that the printer must be replaced. |

**To add a return**

1. Open Tom Dale's ticket.
2. Click the **Returns** tab. If the tab is not visible, click the **More Tabs** tab.
3. Click the **Insert New Return** button.
4. Verify that the **Ticket ID**, **Account**, and **Contact** are correct.
5. In the **Reason** box, type **Printer overheats**.
6. In the **Customer PO** box, type the customer purchase order.
7. Click the **Status** drop-down arrow and select **Return Received**.
8. Click the **Type** drop-down arrow and select **Send Replacement**.
9. Click the **Priority** drop-down arrow and select **Next Day**.
10. In the **Expected By** box, click the **Calendar** button, and select this Friday.
11. Click the **Assigned to Find** icon and use the lookup to find and select your name, and then click **OK**.
12. Click **Save**.
    The Return Detail view opens.
13. Click the **Ship To Details** tab. If the tab is not visible, click the **More Tabs** tab.
14. Verify the contact and address information is for Tom Dale at Beeker Motors.

## Adding Products and Shipping Details to a Return

You add products to a Return to indicate which product the account is returning, and which is the replacement product to be shipped to the customer.

| Our scenario: |
|---|
| You added the return for Tom Dale's ticket and now want to add the product asset that Tom is returning. |

#### To add an asset to a return

1. Open the detail view for the return you created for Tom Dale's printer.
2. Click the **Details** tab. If the tab is not visible, click the **More Tabs** tab.
3. In the **Assets to Return** section, click the **Associate Asset** button.
4. Locate and select the **NetPrinter Laser Elite printer** using the lookup.
5. Click **OK**.

#### To update the shipping contact information

1. On the Return detail view, click the **Ship To Details** tab. If the tab is not visible, click the **More Tabs** tab.
2. Verify that **Tom Dale** is the **Ship To** contact.
3. Use the **Carrier** and **Tracking #** boxes to include additional shipping information.
4. In the **Attention** box, type **Tom Dale**.
5. Verify that the address information is correct.
6. Type any special shipping instruction in the **Special Instructions** box.
7. Click **Save**.

#### To add the products to be returned and replaced

1. Under **Assets to Ship**, click **Add Return Shipped Product**.
2. In the **Add Return Shipped Product** dialog box, under **Received Product**, click the **Find** button, select **NetPrinter Laser Elite** printer, and then click **OK**.
3. Select **Return Existing**.
   The returned product is automatically added.
4. Click the **Shipped Date Calendar** button and select today's date.
5. Click **OK**.

For more information see the "Using the Return Ship To Details Tab" topic in the Infor CRM SLX Web Client Help.

## Closing a Return

The stage at which a return is closed and the person responsible for closing the return depend on the process within your company. As an example, when the product has been returned by the customer and the replacement product has been shipped, that might be the stage at which you would close a return.

| **Our scenario:** |
| --- |
| Now that Tom Dale's replacement printer has been shipped to him, you want to close the return. |

**To close a return**

1. Open the detail view for the return you created for Tom Dale's printer.
2. In the **Status** box, click the drop-down arrow, and then select **Closed** from the list.
3. Click **Save**.

# Working with Defects

A defect is a record describing a problem in a product or process. It is similar to a ticket, but people involved in the design or construction of the product typically resolve defects. The system tracks defects so that problems with a product or process can be resolved in a timely manner, and company management is aware of issues with these products or processes.

## Adding a Defect to an Existing Ticket

When you discover a problem in a product or process, you can add a defect to Infor CRM SLX.

| **Our scenario:** |
| --- |
| After receiving Tom Dale’s printer you discovered that there is a problem with the cooling fan. You need to enter a defect to track the problem. |

**To add a defect to an existing ticket**

1. Open Tom Dale's ticket.
2. Click the **Defects** tab. If the tab is not visible, click the **More Tabs** tab.
3. Click the **Create Defect** button.
4. Click the **Project** drop-down arrow and select **Hardware**.
5. In the **Version Found** box, click the drop-down arrow,and select **1**.
6. In the **Target Version**, click the drop-down arrow, and select **2**.
7. Leave the **Status** as **Open**.
8. In the **Current Progress** box, click the drop-down arrow, and select **Customer Return**.
9. In the **Priority** and **Severity** boxes, click the drop-down arrow, select the importance and impact of the issue.
10. In the **Frequency** box, click the drop-down arrow,and select **Weekly**.
11. In the **Type** box, click the drop-down arrow, and select **Power**.
12. In the **Area** box, click the **Find** button and in the **Area** list select **Hardware**.
13. In the **Category** list, select **Printer**.
14. In the **Issue** list, select **Power**, and then click **OK**.

15. Select the **Submit for SpeedSearch** option so that this issue can be found using SpeedSearch.
16. In the **Public Access** box, select **5-internal**.
17. Click the **Assigned To Find** button , select your name from the list, and then click **OK**.
18. In the **Source** box, click the drop-down arrow, and select **Parts**.
19. In the **Subject** type **Printer fan stops and printer overheats**.
20. In the **Description** box, click the **User Date Stamp** button, and then type **Cooling fan stops which causes the printer to overheat and turn off during a print job**.
21. Click **Save**.

## Closing a Defect

The stage at which a defect is closed and the person responsible for closing the defect depend on the process within your company.

| Our scenario: |
| --- |
| The problem with the NetPrinter Laser Elite fan has been identified. You are ready to add a resolution and close the defect. |

**To close**

1. Open the defect you created for the **NetPrinter Laser Elite**.
2. In the **Fixed in Version** box, click the drop-down arrow and select an item from the list.
3. In the **Status** box, click the drop-down arrow, and then select **Closed**.
4. Click the **Details** tab.
5. In the **Resolution** box, click the **User Date Stamp** button, and then type **Fan is too small. Any printers experiencing this problem should be returned and the fan will be replaced.**
6. Click **Save**.

# Chapter 8
# Using Web Reporting and Analysis Tools

Infor CRM SLX includes reporting and analysis tools that help you identify opportunities, guide you through interactions with a customer, and evaluate sales effectiveness.

The Reports List view provides a list of pre-defined sample reports to enable you to view and analyze information in the Infor CRM SLX database. You can run reports related to Main views such as Contact, Account, Opportunity and so on. If you prefer, you can modify the report to accommodate your business needs. The specific reports available to you are determined by your system administrator.

Customer journeys guide users through interactions with a record, for example an opportunity or contact, and provide a graphical representation of the stages of a customer journey.

The Dashboard is a tool set that allows you to display and interact with a variety of performance and analysis information in a dashboard format. You can use the data provided to gain insight into organizational and individual performance, discover root causes for performance issues, and then take the corrective actions or make strategic decisions.

In this chapter, you will learn to:

- Use the Reports view
- Run a report
- Export and print reports
- Work with Dashboards
- Use Dashboard widgets

## Using the Reports View

Reports enable you to view information about contacts, accounts, opportunities, tickets, and other related data.

The Reports view allows you to select from a list of available sample reports and apply filters to narrow the results. You can only access reports that have been released to you by the system administrator. Reports can be released to you personally, or to a team that you are a member of. When you view or print any report, only records you have access to are included in the report.

| Our scenario: |
|---|
| You want to run a report listing all the interactions you have had with your contacts. |

**To run a report**

1. On the Navigation Bar, click **Reports**.
2. In the **Report list view**, **Reports** tab, select the **Contact Summary - Sample** report, right-click, and then click **Run Report**.
   This is the option for reports you want to run only once, or reports you require immediately.
3. In the **Select Records** dialog box, in the **Show records that match** box, pick **All Records**.

4. Click **Next**.
5. In the **Enter Values** dialog box do the following:
   - Leave **View Notes** as **Yes**.
   - Use the pick list to change **Start each contact on a new page** to **No**.
6. Click **Next**.
7. In the **Export Options** dialog box, use the pick list to select PDF as the file format for your report.
8. If you selected Schedule in step 1, you can create a job schedule for running your report. Select from the available scheduling options.
9. Click **Finish**.
10. When the progress message box appears, do one of the following:
    - Wait for the job to complete and open your report from the link that displays.
    - Click **Close** to dismiss the box. The report continues to process in the background. When the report is available, a job notification alert appears in the menu bar. You can either view the report from the Job Notifications box or from the Reports History tab.

# Viewing, Printing, and Storing Reports

When you run a report, it is stored in the Reports History tab until you choose to delete it. From this tab you can see history for the report, open the report, print, save the report elsewhere, or store the report for future reference.

#### To find the Report History tab

1. On the Navigation bar, click **Reports**.
2. In the **Report List view**, click the **History** tab.

#### To open a report

- In the **Report History** tab, in the **Report** column, click the report name.
  The report opens in the native application for the report file type.

#### To print or save the report

- Use the tools available in the native application.

#### To delete a report

1. In the **Report History** tab grid, select the report.
2. Right-click and then click **Delete**.

# Using Customer Journeys

Customer journeys are a series of stages and steps to guide users through interactions with a record, for example an opportunity or contact, and provide a graphical representations of the stages of a customer journey.

Stages group steps together. Each stage shows the stage name and the percentage probability of completing the customer journey successfully when the stage is completed. Steps are the actions that will complete the stage. For example, the steps in a stage called Demonstration might include steps for Demonstration Preparation, Product Demonstration, and Demonstration Thank You email.

You can use the Customer Journey tab on some detail views to select and start a customer journey and track your progress by performing and completing steps and stages. On the Dashboard, the Customer Journey Kanban widgets allow you to view a list of the records in each stage of a selected customer journey as well as roll-up statistics in each stage.The Account detail view Customer Journey 360 tab provides an overview of all of the customer journeys for the account and customer journeys for related contacts, converted leads, opportunities, quotes, sales orders, and tickets.

Customer journeys are created and managed by the administrator.

## Starting and Performing a Customer Journey

The Customer Journey tab is available on the Contact, Account, Lead, and Opportunity detail views.The tab consists of a graphical representation of the stages as well as statistics at the top and a check list of stages and related tasks below. A record can have multiple customer journeys at one time. The Customer Journey tab is available on the Contact, Account, Lead, and Opportunity detail views.

Customer journeys are only available if created by your administrator.

Customer Journeys for a converted lead are available in the new contact’s Customer Journey tab, but are read-only.

**To start a customer journey**

1. On a detail view click the **Customer Journey** tab. If the tab is not visible, click More Tabs.
2. Click the **Customer Journey** drop-down arrow and select from the list.

   The stages and steps, as well as statistics for the selected customer journey display.
3. Click **Start**.

   Once a customer journey is started, the Start button is replaced with statistics for the current stage of the selected customer journey.

## Working through a customer journey

Once a customer journey is started, you can do the following:

- View status and statistics.
  - Per customer journey
    - Current Stage
    - Stage Estimated Completion – The estimated date the stage will be completed based on the stage start date and the number of estimated days in the stage.
    - Customer Journey Estimated Completion – The estimated date the customer journey will be completed based on the sum of the estimated days in the stages that have not been completed.
  - Per stage
    - Estimated Days in Stage – The expected number of days it will take to complete the stage as specified for the customer journey.
    - Actual Days in Stage – The number of days between when the stage started and closed.
      - Close Probability – The probability of completing the customer journey successfully.
- To perform a step, click the **Step** link. The action depends upon the action type which is identified by an icon. Some action options may have already been defined by the administrator.

| Icon | Step Action | Description |
|---|---|---|
| | Mail Merge | Opens the Mail Merge dialog box.<br>Once the mail merge completes, the link will do one of the following:<br>■ If merged to a file - opens the .zip file that contains the merged documents.<br>■ If merged to an email – displays a message asking if you want to perform the mail merge again. |
| | Meeting | Opens the Schedule Meeting dialog box.<br>Once scheduled, the link will open the scheduled activity to view or edit or completed activity. |
| | None | This step does not contain an action. |
| | Notes | Opens the Insert Note dialog box. Once saved, the link opens the note to view or edit. |
| | Phone Call | Opens the Schedule Phone Call dialog box. Once scheduled, the link will open the scheduled activity to view or edit or completed activity. |
| | To-Do | Opens the Schedule To Do dialog box.<br>Once scheduled, the link will open the scheduled activity to view or edit or completed activity. |
| | Workflow | A message displays that workflow was started.<br>Once started, the link will display a message asking if you want to start another instance of the workflow. |

- To complete a step, select the check box in the column next to the step name.

  You cannot complete a step if a previous required step is not completed.

- To complete a stage
  - Do one of the following:
    - Select the check box in the column next to the stage name.
    - Complete all steps within a stage. Once the checkboxes for all steps in a stage are selected the stage is automatically completed.

  - You cannot complete a stage if any required steps are not completed.
  - Completing stages out of order may cause unexpected results in the Customer Journey heading information.

## Using the Account detail view Customer Journey 360 tab

Use the Account detail view Customer Journey 360 tab to view a graphical representation of all started customer journeys for the account and any associated contacts, converted leads, opportunities, sales orders, quotes or tickets associated with the account.

To open the customer journey 360 tab:

- On the Account detail view, click the Customer Journey 360 tab.

On this tab you can:

- Use the scroll bar to scroll up and down
- Use your mouse wheel to zoom in or zoom out
- Click the **Reset Zoom** button to reset the zoom.
- Click and drag to move along the time line or to reposition the customer journeys
- Filter the customer journeys that display in the tab.
  - Click the **Filters** Maximize icon to display the filter options.
  - Clear or select the check boxes to determine the types of customer journeys to display.
  - Select the **Filter by date range** check box and use the **From** and **To** options to define a date range by specifying a number, selecting a time frame, and then, if necessary, clicking the Calendar icon to select a date. For example:<br>From: 2 years before 01/01/2024 To: 1 year after 01/01/2025.
  - Click **Apply** to apply the filters.
  - Click the **Filters** Minimize icon to hide the filter options.
- View Customer Journey information:
  - Type
  - Name
  - A link to the record associated with the customer journey
  - Expected Complete or Completed date and if the customer journey progress is on schedule, running late, or running early.
  - Click the customer journey bar to open the Customer Journey details dialog box.
- View the started stages of a customer journey
  - The customer journey bar extends from the started date to the expected complete date or completed date if the customer journey is complete.
  - Started stages display as colored bars from the stage start to end date.
- View the started steps for a customer journey
  - Hover over an icon to see limited details.
  - Click the icon to open details of the step

# Working with the Dashboard

The Dashboard allows you to display and interact with a variety of performance and analysis tools. You can maintain one or more personalized dashboard tabs and, with the appropriate permissions, you can modify dashboards provided by Infor CRM SLX or customized by your administrator.

You can format the data on the dashboard using widgets to gain insight into organizational and individual performance including the ability to measure multiple metrics in the same widget. A widget is a dynamic, reusable element of the interface that displays the data you specify. The data can be visualized in a pie or donut chart, gauge (speedometer), bar or column chart, pipeline, or line graph, or you can view the detailed data in a list. For more information about widgets, see "Working with Widgets" on page 83.

There are three out-of-the-box dashboard tabs: My Dashboard, Sales, and Samples. Each tab has several out-of-the-box widgets. You can add and edit widgets to display different data or display the same data in different ways.

#### To open the dashboard

- On the Navigation Bar, click **Dashboard**.

## Customizing Your Dashboard

Use the context menu on a dashboard tab to add a new tab, copy, hide/show and delete tabs, or share tabs with your team or department. Use drag-and-drop to rearrange the widgets on the tab. Widgets automatically size to fit the data and chart type, as well as the column size.

You can also send all the data for a group from a list view to a group list widget on the dashboard with the Promote to Dashboard link on the list view Tasks Pane.

#### To add a new tab

1. On the Dashboard menu, click **New Tab**.
   To open the Dashboard menu, click the three lines in the upper right-hand corner.
2. In the **Name** box type a name for the tab
3. Click **Save**.

#### To share a tab with other users

1. On the Dashboard menu, click **Share Tab**.
   To open the Dashboard menu, click the three lines in the upper right-hand corner.
2. Do one of the following:
   - To add users, departments, teams or everyone:
     a. Click the Add button in the Share Tab window.
        The Share with window is displayed.
     b. Click the **Share with** drop-down arrow and select the user, department, or team to share with.
     c. Click **Save**.
     d. Repeat steps athrough c for each user, team, or department you want to share the group with.
     e. When finished, click **Share**.
   - To change a user, department, or team:

a. Click the Edit icon for the user, team, or department to be modified. The Share With window is displayed.
b. Select the user(s).
c. Click **Save**.
d. Repeat steps a through c for each user, team, or department you want to edit.
e. When finished, click **Share**.

- To remove a user, department, or team:
  a. Click the Delete icon for the user, department, or team to be removed.
  b. Click **Save**.
  c. Repeat steps a through c for each user, team, or department you want to remove.
  d. When finished, click **Share**.

#### To promote a group to a dashboard

1. From a list view, click the group tab you want to send to the dashboard.
2. In the Task Pane, click **Promote to Dashboard**.
3. Click the name of the dashboard where you want to send the data, and click **OK**.
4. Click **OK**.
5. Click **Welcome** in the Navigation Bar and select the dashboard tab you selected in step 3.
   The data appears on the dashboard in a group list widget. The default configuration for the group list is 10 lines; however you can change this in the widget editor to display up to 50 lines.

## Working with Widgets

Widgets are plug-ins you can add to a dashboard. There are several types of widgets you can use to display your data. Move your mouse over the chart in a widget to display the dimension and metric selected for that widget.

There are several types of widgets:

The list of available widgets is determined by your implementation. You may not have access to all widget types.

- Charting - Bar, Bubble, Column, Donut, Funnel, Gauge, Line, and Pie charts
- Other - Group List, Links, SData Feed, and Infor CRM SLX Welcome

### Using Widgets

You can add, edit, and delete widgets from the dashboard, and you can reorder widgets on the page with drag-and-drop.

| Our scenario: |
| --- |
| You want to show potential revenue of opportunities in your pipeline for each level of revenue. |

#### To add a funnel chart widget

1. Right-click a Dashboard tab and click **Add Content**.
2. Click the **Add** button under **Funnel Chart**.
3. Type a **Title** for the funnel chart, for example **Open Opportunities by Sales Potential**.
4. In the **Entity** list select **Opportunity**.
5. In the **Group** list select **All Open**.

6. In the **Dimension** list select **Stage**.
7. In the **Metric** list select **Sum Sales Potential**.
8. Determine if you want to **Display Labels**, **Truncate Labels** and what the **Label Length** is.
9. Click **OK**.
   A range of sales potential amounts displays with each sales potential range represented as a different colored level. The size of each level represents the number of opportunities within a particular sales potential range.

#### To edit a widget

1. Find the widget you want to edit and click the Settings button to open **Widget Settings**.
2. Make the required changes.
   Options are the same as tadding a widget and depend on the widget type.
3. Click **Save**.
   The widget displays the changes.

#### To delete a dashboard widget

1. Click **Dashboard** on the navigation bar.
2. Select the tab that contains the widget to be delete.
3. Find the widget and click the Settings button to open **Widget Settings**.
4. Click **Delete**.
5. Click **OK** to confirm the deletion.
   The widget is permanently deleted from the dashboard.

#### To reorder widgets on a tab

1. On the Navigation bar, click **Dashboard**.
2. Select the tab you want to change.
3. On the **Dashboard** menu, click **Reorder Widgets**.
4. Drag and drop the widgets into the desired position.

   The order is presented in a single column, but when finished multiple widgets may display on the same row depending upon the widths set for each widget.

5. Repeat until you have designated the desired order of widgets.
6. When finished, click **Finish**.

# Working with List View KPIs

The list views contain Key Performance Indicators, or KPIs. The KPIs are based on the current list of records,the group and any applied filters. Some KPIs can be specific to a subset of data, for example in theOpportunities list view, a KPI for Average Actual Amount can be calculated using the actual amount for allclosed-won opportunities in the list and a count of closed-won opportunities.

The list views display KPIs if at least one KPI is selected. These list views contain out-of-the-box KPIs to select from:

- Accounts
- Opportunities
- Quotes
- Sales Orders
- Invoices (Infor CRM SLX Back Office only)
- Contracts
- Returns
- Tickets

## Managing List View KPIs

**To manage list view KPIs**

1. Click the **Manage KPIs** icon on the list view.
2. Select the check boxes of the required KPIs to show and clear the check boxes of the KPIs to hide.

   Selecting a large number of KPIs to display can increase the loading time for KPIs and decreasethe amount of horizontal space for each KPI.

3. Click **Save**.

# Chapter 9
# Setting User Options

Infor CRM SLX provides tools to allow you to modify some parts of the interface so that you can work in the way that suits you best. Your settings that you enter are recorded for you and are not visible to other Infor CRM SLX users.

## General Options

Use the General tab to specify such settings as which view opens by default when you first log into Infor CRM SLX Web Client, and who to use as the default owner for any new records you create.

**To set general options**

1. On the **Tools** menu, click **Options**.
2. Click the **General** tab.
3. In the **Show on Startup** box, select the default view you want to display when you log in to the Web Client, (for example, What's New or Calendar).
4. In the **Default Owner/Team** box, click the **Find** button, select the user or team you want to be the default owner for new accounts, and then click **OK**.
5. For Multi-Currency only: To select a currency type, click the **My Currency Find** button, select a currency from the list, and then click **OK**.
6. If you need updated pick list data, click the **Refresh Pick List Data** button.
   You should only click this button if there are updated pick list items available.
7. If you want to be notified when you have unsaved changes on a page, select the **Prompt for unsaved data** check box. This option is selected by default. Clear the check box if you do not want to be notified.
8. Select the **Default Username/Time Stamp in Memo Fields** if you want to have the option to click the User Date Stamp button to add your name, the date, and time (according to your language settings) to a memo box.
   This option will only work on memo boxes on which your administrator has turned on this feature.
9. Select the **Display List view check boxes** option if you want all of your list views to include a column of check boxes.
10. If you want to be automatically logged out of the Infor CRM SLX Web Client after a period of inactivity, select the **Enable Automatic Logoff** option, and then under **Log off after** type the allowable number of minutes of inactivity.
11. Click the **Contact Sync Group** drop-down arrow and select the ad hoc contact group that will contain the contacts to synchronize. If the ad hoc group you want to sync your contacts to does not appear in the list, you must first create the group.
    Do not select a contact sync group if you are only synchronizing with Outlook using Outlook sync. If you are using Outlook sync, see "Configuring the Contact Sync Group" in the Infor CRM SLX Web Client Help.
12. In the **Log to History** box, select **Prompt** if you want the **Complete E-mail** dialog box to display after you drag and drop an e-mail message. If you want the message to be recorded to history without prompting, select **Do Not Prompt**.

This option only applies to dragging and dropping e-mails. You must set options for Send to CRM and Record to History in Outlook. See "Configuring Outlook Integration" on page 26.

13. To install Infor CRM SLX Xbar for Microsoft Outlook, click **Install Xbar for Outlook**.
14. To install the Mail Merge for Microsoft Word add-in, click **Install Mail Merge for Microsoft Word**. For more information, see "Understanding Infor CRM SLX Mail Merge for Microsoft Word" on page 22.
15. For Offline Web Client users only: To run reports while see target, ensure the **Use ActiveReporting** check box is selected.
16. Click **Save**.
    You must click Save on each tab or your option selections will not be saved.

## Group Options

Use the Groups options tab to determine how your groups, list views and lookups will appear and behave. These options only apply when the current user is signed in to the Infor CRM SLX Web Client.

### To set group options

1. On the **Tools** menu, click **Options**.
2. Click the **Group** tab.
3. Set your **Group Options**.
    a. Click the **Main View** drop-down arrow and select a view from the list.
    b. Click the **Default Group** drop-down arrow and select a default group from the list. For example, Latest Contacts.

    - The default layout for new groups is determined by the group selected as the default group.
    - If your default group does not display as a tab, you must mark it as a Favorite in the Groups list.

    c. Click the **Default Lookup Layout** drop-down arrow and select the name of the group with the layout you want to see for any lookups on that main view. For example, on the Contact views, all lookups will use the Latest Contacts group layout.
    The group you select will also determine what search items are available in the Lookup. The Lookup by options depend on the columns included in the layout of the lookup. You should choose a group that includes all of the columns you may want to search by in a lookup.
    d. Repeat steps a-c for each main view.
4. Under **General Lookup Options**, click the **Default Lookup Condition** drop-down arrow and select the lookup condition you would like to use for all list view lookups. Options include: Starting With, Contains, Equal to, and Not Equal to.
5. Click **Save**.
    You must click Save on each tab or your option selections will not be saved.

## Calendar Options

Calendar Options allow you to adjust the content and appearance of your calendar to accommodate the way you work. You can set the type of information that displays in activities, the start and end of the work day, the default calendar view, default interval on the calendar, and whether or not completed activities (history) items display. History items only display on the day and week calendars by default.

**To set calendar options**

1. On the **Tools** menu, click **Options**.
2. Click the **Calendar** tab.
3. In the **Default Calendar View** box, click the drop-down arrow and select the default calendar view you want to display when you open the Calendar view.
4. In the **Number of Events on Day/Week** box, click the drop-down arrow and select the maximum number of events that you want to display in the top part of the Calendar Day and Week views.
5. In the **Show History On Calendar** box, click the drop-down arrow and select **Yes** to display history items or **No** if you do not want history items to display on the Calendar Day view.
6. In the **Remember Selected Users**, click the drop-down arrow and select **Yes** if you display multiple users on your calendar view and want to save the list of users between sessions.
7. Under **Work Week**, select the days of the week that are included in your work week.
8. In the **First Day of the Week** box, click the drop-down arrow and select the day on which your work week starts.
9. Set the following options to customize your calendar:
   a. **Day Start** - Select the time that your workday begins.
   b. **Day End** - Select the time that your workday ends.
   c. **Default Interval** - Select whether the calendar displays information in 15, 30 or 60 minute intervals.
10. **Contact/Account** - Select how you want contact and account information to display on the Calendar. This option does not apply to the month view.
11. Set the **Show on Activities** options to define how activities are displayed on the Calendar timeline for day and week views. These options do not apply to the month view.
    - **Opportunity** - Displays an activity's opportunity information, if applicable, on the day and week calendar views.
    - **Phone Number** - Displays an activity's phone number information on the day and week calendar views.
    - **Regarding** - Displays an activity's regarding information on the day and week calendar views.
    - **Time** - Displays the activity's start and end times on the day and week calendar views.
12. **Default Activity Type** - Select a default activity type. This is the type of activity that will be created when you double-click on any of the Calendar views.
13. Click **Save**.
    You must click Save on each tab or your option selections will not be saved.

## Changing Your Password

You can change your password through the Options in the Infor CRM SLX Web Client.

**To change your password**

1. On the **Tools** menu, click **Options**.
2. Click the **Change Password** tab. type your password in the **Current Password** box.
3. In the **New Password** box, type your new password.

4. Retype your new password in the **Confirm Password** box.
5. Click **Save**.

## Opportunity Options

Use the Opportunities tab to specify default settings for any new opportunities that you enter into the Infor CRM SLX Web Client. These options only apply when the current user is signed in to the Infor CRM SLX Web Client.

**To set opportunity options**

1. On the **Tools** menu, click **Options**.
2. Click the **Opportunities** tab.
3. In the **Opportunity Description** area, select **Use default name conventions** if the default names will be controlled by a script.
   A sample Opportunity Description will appear in the space below the check box. Contact your administrator if you are unsure whether or not you should select this item.
4. To set the estimated close date for the new opportunities you create, under **Use this Estimated Close Date**, select the number of months in the **Set estimated close date to** x **months after opening** drop-down list. You can select from 0 to 36.
5. If you want opportunities to close at the end of the month selected in the preceding step, select the **Initially change estimated close to last day of month** check box.
6. In the **Opportunity Status** box, click the drop-down arrow and select from the list. (The default setting is Open.)
7. In the **Opportunity Type** box, click the drop-down arrow and select from the list. (This setting is blank by default.)
8. From the **Probability** drop-down list, click the drop-down arrow and select a probability of close that will be the default for new opportunities. This option is ignored if you choose a default Sales Process in step 9.
9. To automatically include new opportunities in forecasts, select the **Add to Forecast** check box. Clear this check box if you do not want to automatically include new opportunities in forecasts. You can also manually select the Add to Forecast check box when adding or editing an opportunity.
11. For **Multi-Currency** only: Click the **Default Currency Find** button to select from the list.
12. Select a process from the **Sales Process** list. The list consists of all released sales processes. The default setting is blank.

    The Default Sales Process box will be unavailable if the SalesLogix Advanced bundle is not installed.

13. In the **Default Contact(s)** area you can determine which contacts should be added to new opportunities by default. Default Contact options are:
    - Add all contacts associated with account
    - Add only the account's primary contact
    - Add no contacts
17. Click **Save**.
    You must click Save on each tab or your option selections will not be saved.

## User Profile Options

Use the User Profile options tab to determine how the Infor CRM SLX Web Client will appear and behave. These options only apply when the current user is signed in to the Infor CRM SLX Web Client.

If Infor Infor OS single sign-on is configured, Infor CRM language settings will be based upon the browser language settings, not the User Profile, Language Selection. Infor CRM SLX recommends making sure that both the browser and Language Selection are the same to ensure an optimal experience.

**To set user profile options**

1. On the **Tools** menu, click **Options**.
2. Click the **User Profile** tab.
3. If necessary, change the language setting.
   Changing the language will cause the Infor CRM SLX Web Client to display in your selected language. If you do not select a language, then the Infor CRM SLX Web Client will use the default language. The list of languages is based upon the languages supported by your organization.
   - Click the **Language Selection** drop-down arrow and select a language from the list.
4. Select a regional format in the **Regional Format** field.

   For more information on Regional Formats, see the Web Client help topic "Using Regional formats".
5. Click **Save**.
   You must click Save on each tab or your option selections will not be saved.

## Alerts Options

Use the Alerts tab to set defaults to determine how you will be alerted for alarms and new unconfirmed activities.

**To set alerts options**

1. On the **Tools** menu, click **Options**.
2. Click the **Alerts** tab.
3. Select **Display in toolbar** if you want Alerts to appear in your toolbar

   If you do not select this option, then the remaining check boxes will be unavailable and you will not be notified of your Alerts.

4. Select **Prompt for Alerts** if you want the Alerts dialog box to display when you have new alerts.
5. Under to **Include**, select the information you want to include in your Alerts. If you selected Prompt, this is the information that will cause the Alerts dialog box to open:

   If you do not select any options, and you selected to display or prompt for Alarms, then your Alerts will be empty and will not prompt.

   - Select **Alarms** if you want your alarms to display in your Alerts.
   - Select **Unconfirmed Activities** if you want your unconfirmed activities to display in your Alerts.
6. Click the **Default Snooze** drop-down arrow and select from the list to set the default amount of time to postpone an activity alarm. You can still change the snooze time from the Snooze list before you snooze your alarms.
7. Click **Save**.
   You must click Save on each tab or your option selections will not be saved.

## Activities Options

Use the Activities tab to set defaults such as activity type.

**To set activity options**

1. On the **Tools** menu, click **Options**.
2. Click the **Activities** tab.
3. In the **Default Follow-up Activity** drop-down list, select the type of activity to be scheduled as a follow-up, after you complete an activity.
4. In the **Carry Over Notes** drop-down list, select **Yes** if you want to carry over any existing notes. when you schedule a follow-up activity.
5. In the **Carry Over Attachments** drop-down list, select **Yes** if you want to carry over any existing attachments when you schedule a follow-up activity.
6. Select **Display Past Due in the toolbar** if you want to be notified of past due activities.
7. Do one of the following:
   - Select **Show history for all participants** if you want history records for all activity participants to display in the detail views Notes/History tab.
   - Clear **Show history for all participants** if you want history records for only the primary participant to display in the detail views Notes/History tab.
8. Under the **Defaults Per Activity Type** section, set the Default Alarm and Default Duration for each activity type:
   a. Click the **Default Alarm** drop-down arrow and select from the list to set the default alarm when scheduling a new meeting.
   b. Click the **Default Duration** drop-down arrow and select from the list to set the default duration when scheduling a new meeting.
   c. Select the **Default Timeless** option if you want an activity to be timeless by default.
   d. If you selected the **Default Timeless** option and you want activities to automatically rollover to the next day if they are not completed on the scheduled date, then select the **Auto Rollover** option.

      You can only rollover timeless activities.

   e. Repeat steps a-d for Phone Call, To Do, and Personal Activity.
9. Click **Save**.
   You must click Save on each tab or your option selections will not be saved.

## Setting Customer Service Options

Customer Service Options allow you to set options like date and time stamp settings and time tracking options.

**To set customer service options**

1. On the **Tools** menu, click **Options**.
2. Click the **Customer Service** tab.
3. Under **Time Tracking**, do the following:
   a. If you are required to track your time when processing new issue, select **Automatically Punch In to a new Ticket**.

b. If you are required to track your time when processing and resolving existing issues, type the number of minutes in the **Prompt to Punch In to an existing Ticket** text box.

c. Select **Display Ticket Activity on Punch Out** to automatically display the Edit Ticket Activity dialog box for you to enter activity information when punching out of a ticket.

d. Select **Display Ticket Activity on completion of Calendar Activity (WIndows version only)** to automatically display the Edit Ticket Activity dialog box for you to enter the activity information for a completed calendar activity.

> The Display Ticket Activity on completion of Calendar Activity (Windows version only) option only applies to the Windows Client

4. Click **Save**.

## Multi-Factor Authentication Options

Use the Options, Multi-Factor Authentication tab to add, edit, or delete your Multi-Factor Authentication (MFA) method methods. The available methods depend upon what is allowed by your administrator.

> If you plan to use an authenticator application you must first have access to that application on your mobile device.

**To manage Multi-Factor Authentication options:**

1. From the **Tools** menu, click **Options**.
2. Click the **Multi-Factor Authentication** tab.
3. View the list of Multi-Factor Authentication methods you have already created.
4. Click **Insert New Item** to add a new method.
   a. Click **Insert New Item** to add a new method.
   b. In the **Name** box type a descriptive name for your authentication method.
   c. Select **Is Default** if you want this to be your default authentication method.
   This will clear the Is Default from the authentication method previously designated as the default.
   d. Click the **Authentication Method** drop-down arrow and select from the list. The options available depend on what your administrator has implemented, but may include:
      - Email
      - Authenticator Application
   e. Click **OK**.
5. To edit an existing method, select the method in the list and click **Edit Selected Item**.
   a. You may modify either of the following:
      - **Name** – the descriptive name for your authentication method.
      - **Is Default** – Identifies the default authentication method.
      If selected, Is Default is cleared from any authentication method previously designated as the default.
   b. Click **OK**.
6. To delete a method, select the method in the list, click **Delete Selected Item**, and then click **OK** to confirm the deletion.

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