Getting Started with the Infor CRM SLX Windows Client

Release 10.0.x

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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 Windows Client helps you manage all aspects of the sales cycle and the customer relationship. 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 Windows Client:

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

Calendar and Activities - 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 dosevents.

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, contracts, returns, or tickets.

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.

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

Advanced Outlook Integration - Use Advanced Outlook Integration to access Microsoft Outlook when sending e-mail, scheduling activities, and managing contacts. This feature must be enabled by your system administrator.

Onsite and Remote Access - Use Infor CRM SLX in your office or from a remote location.

About This Guide

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

If your company has customized the Infor CRM SLX Windows 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* cards provide commonly used shortcut keys, e-mail configuration options, and tips for working with groups and Outlook Integration. The *Infor CRM SLX Quick Reference* cards are accessible from the Start menu. Click Start, point to Programs, point to Saleslogix, point to Documentation, and then click Customer Service and Support User Quick Reference or Sales and Marketing User Quick Reference.
- The Infor CRM SLX Client Help provides detailed information about all of the features available in the Infor CRM SLX Client, 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 KB3652600 and from https://docs.infor.com/en-us/crm. For all previous Infor CRM SLX versions see KB article KB2289845.

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 https://docs.infor.com/en-us/crm or in the KB article for your version of Infor CRM SLX. For Infor CRM SLX version 10.0 see KB3652600. For all other versions see KB2289845.

Chapter 1

Understanding the Infor CRM SLX Windows Client Workspace

Take a few minutes to learn some of the Infor CRM SLX Windows 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 Windows Client
- Understand the Infor CRM SLX Windows 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 Windows Client

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

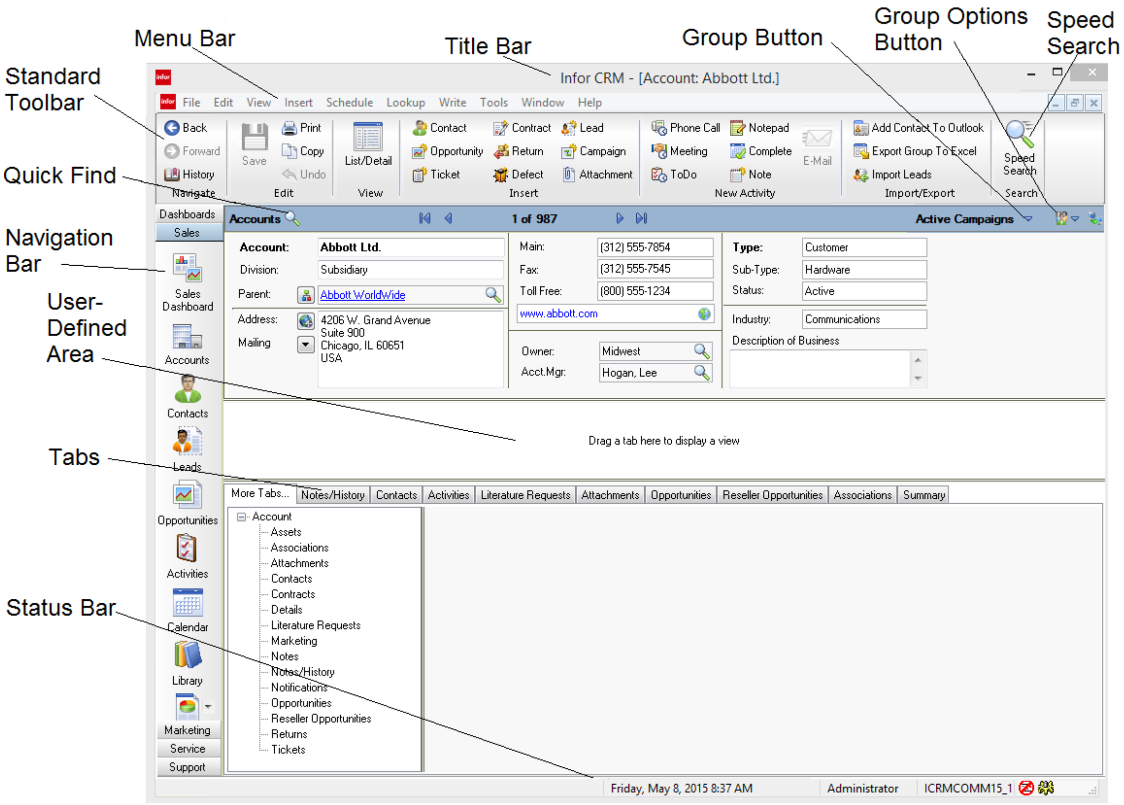
If a database connection was not configured during your installation, you must create a new connection. See the "Logging on to the Infor CRM SLX Client" Help topic for detailed instructions.

To log on

1. Click **Start**, point to **Programs**, point to **Saleslogix**, and then click **Saleslogix Client**.
2. Type your **Username** 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. In the **Log on to** box, select the database you want to use from the list.
   Your company may have more than one database. Be sure to select the correct database for the work you intend to do.
4. Click **OK**.
   The Activity Reminder appears when you have overdue activities, or if you need to confirm any activities. You can act on the listed activities, snooze them individually or as a group, or just close the reminder.

Working in the Infor CRM SLX Windows Client

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


Menu Bar
Title Bar
Group Button
Group Options Button
Speed Search
Standard Toolbar
Quick Find
Navigation Bar
User-Defined Area
Tabs
Status Bar
Infor CRM - [Account: Abbott Ltd.]
File Edit View Insert Schedule Lookup Write Tools Window Help
Back Forward History Navigate
Save Print Copy Undo Edit
List/Detail View
Contact Opportunity Ticket Contract Return Defect Lead Campaign Attachment Insert
Phone Call Meeting ToDo Notepad Complete Note E-Mail New Activity
Add Contact To Outlook Export Group To Excel Import Leads Import/Export
Speed Search Search
Dashboards Sales Sales Dashboard Accounts Contacts Leads Opportunities Activities Calendar Library Marketing Service Support
Accounts 1 of 987 Active Campaigns
Drag a tab here to display a view
More Tabs... Notes/History Contacts Activities Literature Requests Attachments Opportunities Reseller Opportunities Associations Summary
Account Assets Associations Attachments Contacts Contracts Details Literature Requests Marketing Notes Notes/History Notifications Opportunities Reseller Opportunities Returns Tickets
Description of Business

Account: Abbott Ltd.
Division: Subsidiary
Parent: Abbott WorldWide
Address: 4206 W. Grand Avenue Suite 900 Chicago, IL 60651 USA
Mailing
Main: (312) 555-7854
Fax: (312) 555-7545
Toll Free: (800) 555-1234
www.abbott.com
Owner: Midwest
Acct.Mgr: Hogan, Lee
Type: Customer
Sub-Type: Hardware
Status: Active
Industry: Communications
Friday, May 8, 2015 8:37 AM Administrator ICRMCOMM15_1

Figure 1 Infor CRM SLX Windows Client Workspace

Understanding the Workspace Features

Each view in your Infor CRM SLX Windows 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.
Standard Toolbar	Also called the toolbar, the Standard toolbar contains buttons that you click to open the most frequently used Infor CRM SLX commands. To move the toolbar, drag it to another part of the window. From the View menu, you can show or hide toolbars.

Element	Description
Navigation Bar	Located on the left side of the Infor CRM SLX Windows Client workspace, the Navigation Bar contains buttons that open the main Infor CRM SLX Windows Client views. 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. Click the navigation heading to show or hide the iitems listd below the heading.
Menu Bar	The menu bar contains the Infor CRM SLX Windows Client commands. Click a menu to expand it. Each menu item has an access key, which is the underlined letter in the item name. For example, to insert a new contact or account, you can open the Insert menu, then press C. Shortcut keys also appear to the right of some menu items; you can press these keys to activate the feature. For example, to schedule a phone call, press SHIFT + F3. For Windows 7 users, you must press the Alt key to see the underlined access letter.
Speed Search	SpeedSearch helps you find information stored in the Infor CRM SLX database. 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.
Quick Find	The Quick Find button, located in the upper left corner of the view can be used to search for a particular contact, account, opportunity, ticket, lead, campaign, defect, contract, or return.
Previous/Next	Buttons located on the toolbar that allow you to view a previous or next contact, account, or opportunity. These buttons become active when you have viewed more than one contact, account, or opportunity during a single Infor CRM SLX Client session.
Group Button	Located opposite the Quick Find, third from the right on list and detail views, displays a tree view of all groups. You can double-click a group in the tree view to open that group.
Group Options	Located second from right on the on the list and detail views, click the Group Options button to display a menu of options of all groups.
Tabs	Tabs organize information on many of the list views, detail views and dialog boxes.
Tree Views	Tree views are lists of items organized into categories. Click to expand or collapse the tree view.
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 ellipsis button in the box. You may need to click once in the box before the ellipsis button appears.
Lookup Labels	Detail views contain pre-defined label lookups. When you rest your mouse pointer on a label, it becomes a button that you can click to perform a lookup.
Shortcut Menus	Right-click in many Infor CRM SLX views to get a menu of features available for that area.
F8	Use F8 to switch between the Split view open or closed.

Element	Description
Shift F9	Use Shift + F9 in some memo fields to insert a Name/Date/Time stamp in a text box.
Status Bar	The status bar displays the current date, user, database, and status icons, such as whether or not you are logged in to e-mail. Right-click an icon to open a shortcut menu. You can show or hide the status bar by opening the View menu and clicking Status Bar.

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.

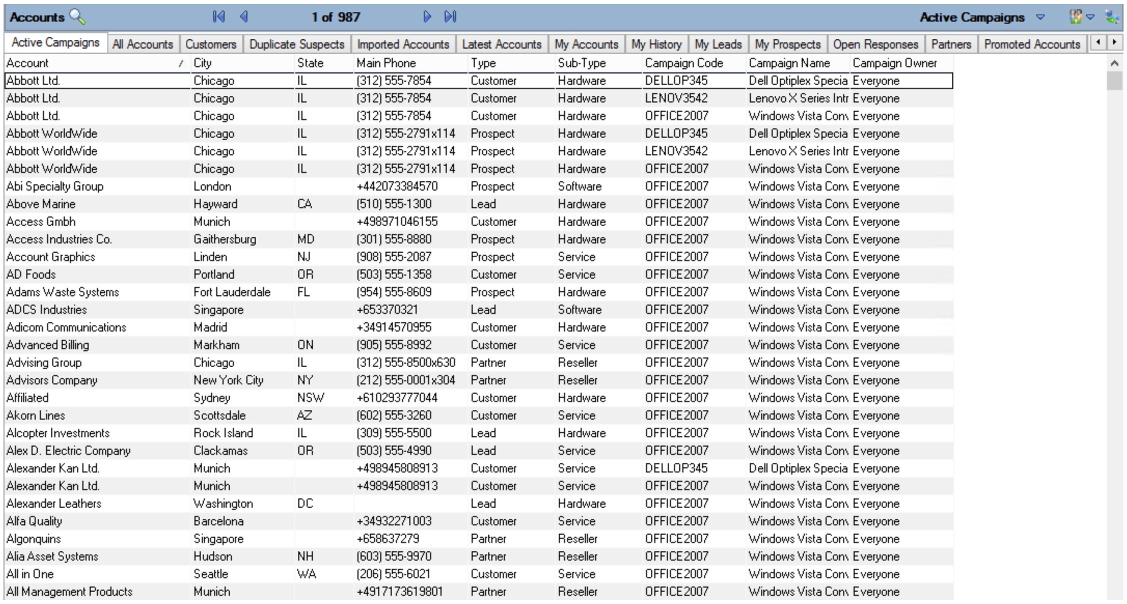
Using List Views

List views display information in a list with columns and rows of information. Press F8 from any detail view to display the corresponding list view. Each tab in the list view contains a group of contacts, accounts, opportunities, or tickets and so on.

- You can customize the List view by sorting information in the columns, rearranging the order of columns, and adjusting column widths.

For more information, see the "Columns" topic in the Sales Client help.

- You can right-click in a List view to open the shortcut menu for options such as adding and deleting group members.



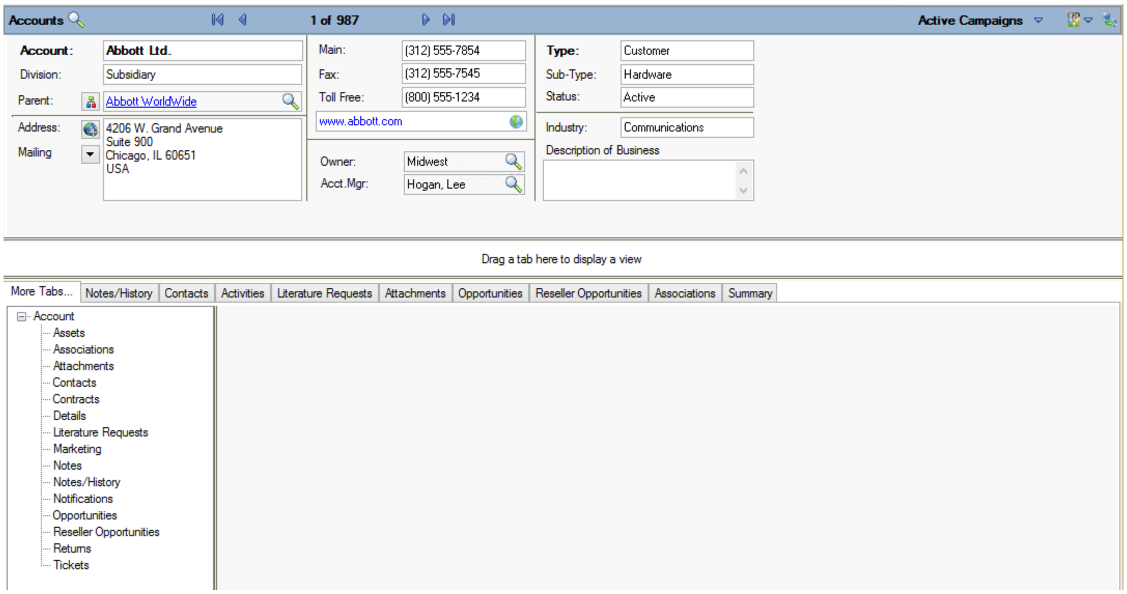
Account	City	State	Main Phone	Type	Sub-Type	Campaign Code	Campaign Name	Campaign Owner
Abbott Ltd.	Chicago	IL	(312) 555-7854	Customer	Hardware	DELLOP345	Dell Optiplex Specia	Everyone
Abbott Ltd.	Chicago	IL	(312) 555-7854	Customer	Hardware	LENOV3542	Lenovo X Series Intr	Everyone
Abbott Ltd.	Chicago	IL	(312) 555-7854	Customer	Hardware	OFFICE2007	Windows Vista Con\	Everyone
Abbott WorldWide	Chicago	IL	(312) 555-2791x114	Prospect	Hardware	DELLOP345	Dell Optiplex Specia	Everyone
Abbott WorldWide	Chicago	IL	(312) 555-2791x114	Prospect	Hardware	LENOV3542	Lenovo X Series Intr	Everyone
Abbott WorldWide	Chicago	IL	(312) 555-2791x114	Prospect	Hardware	OFFICE2007	Windows Vista Con\	Everyone
Abi Specialty Group	London		+442073384570	Prospect	Software	OFFICE2007	Windows Vista Con\	Everyone
Above Marine	Hayward	CA	(510) 555-1300	Lead	Hardware	OFFICE2007	Windows Vista Con\	Everyone
Access Gmbh	Munich		+498971046155	Customer	Hardware	OFFICE2007	Windows Vista Con\	Everyone
Access Industries Co.	Gaithersburg	MD	(301) 555-8880	Prospect	Hardware	OFFICE2007	Windows Vista Con\	Everyone
Account Graphics	Linden	NJ	(908) 555-2087	Prospect	Service	OFFICE2007	Windows Vista Con\	Everyone
AD Foods	Portland	OR	(503) 555-1358	Customer	Service	OFFICE2007	Windows Vista Con\	Everyone
Adams Waste Systems	Fort Lauderdale	FL	(954) 555-8609	Prospect	Hardware	OFFICE2007	Windows Vista Con\	Everyone
ADCS Industries	Singapore		+653370321	Lead	Software	OFFICE2007	Windows Vista Con\	Everyone
Adicom Communications	Madrid		+34914570955	Customer	Hardware	OFFICE2007	Windows Vista Con\	Everyone
Advanced Billing	Markham	ON	(905) 555-8992	Customer	Service	OFFICE2007	Windows Vista Con\	Everyone
Advising Group	Chicago	IL	(312) 555-8500x630	Partner	Reseller	OFFICE2007	Windows Vista Con\	Everyone
Advisors Company	New York City	NY	(212) 555-0001x304	Partner	Reseller	OFFICE2007	Windows Vista Con\	Everyone
Affiliated	Sydney	NSW	+610293777044	Customer	Hardware	OFFICE2007	Windows Vista Con\	Everyone
Akorn Lines	Scottsdale	AZ	(602) 555-3260	Customer	Service	OFFICE2007	Windows Vista Con\	Everyone
Alcopter Investments	Rock Island	IL	(309) 555-5500	Lead	Hardware	OFFICE2007	Windows Vista Con\	Everyone
Alex D. Electric Company	Clackamas	OR	(503) 555-4990	Lead	Service	OFFICE2007	Windows Vista Con\	Everyone
Alexander Kan Ltd.	Munich		+498945808913	Customer	Service	DELLOP345	Dell Optiplex Specia	Everyone
Alexander Kan Ltd.	Munich		+498945808913	Customer	Service	OFFICE2007	Windows Vista Con\	Everyone
Alexander Leathers	Washington	DC		Lead	Hardware	OFFICE2007	Windows Vista Con\	Everyone
Alfa Quality	Barcelona		+34932271003	Customer	Service	OFFICE2007	Windows Vista Con\	Everyone
Algonquins	Singapore		+658637279	Partner	Reseller	OFFICE2007	Windows Vista Con\	Everyone
Alia Asset Systems	Hudson	NH	(603) 555-9970	Partner	Reseller	OFFICE2007	Windows Vista Con\	Everyone
All in One	Seattle	WA	(206) 555-6021	Customer	Service	OFFICE2007	Windows Vista Con\	Everyone
All Management Products	Munich		+4917173619801	Partner	Reseller	OFFICE2007	Windows Vista Con\	Everyone

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 Windows 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. To change which tabs display, right-click a tab. A check mark indicates if a tab will show. To show a tab, click the tab name to show a check mark.To hide a tab, click the tab name to clear the check mark.


Accounts
1 of 987
Active Campaigns
Drag a tab here to display a view
More Tabs...
Notes/History
Contacts
Activities
Literature Requests
Attachments
Opportunities
Reseller Opportunities
Associations
Summary
Account
Assets
Associations
Attachments
Contacts
Contracts
Details
Literature Requests
Marketing
Notes
Notes/History
Notifications
Opportunities
Reseller Opportunities
Returns
Tickets

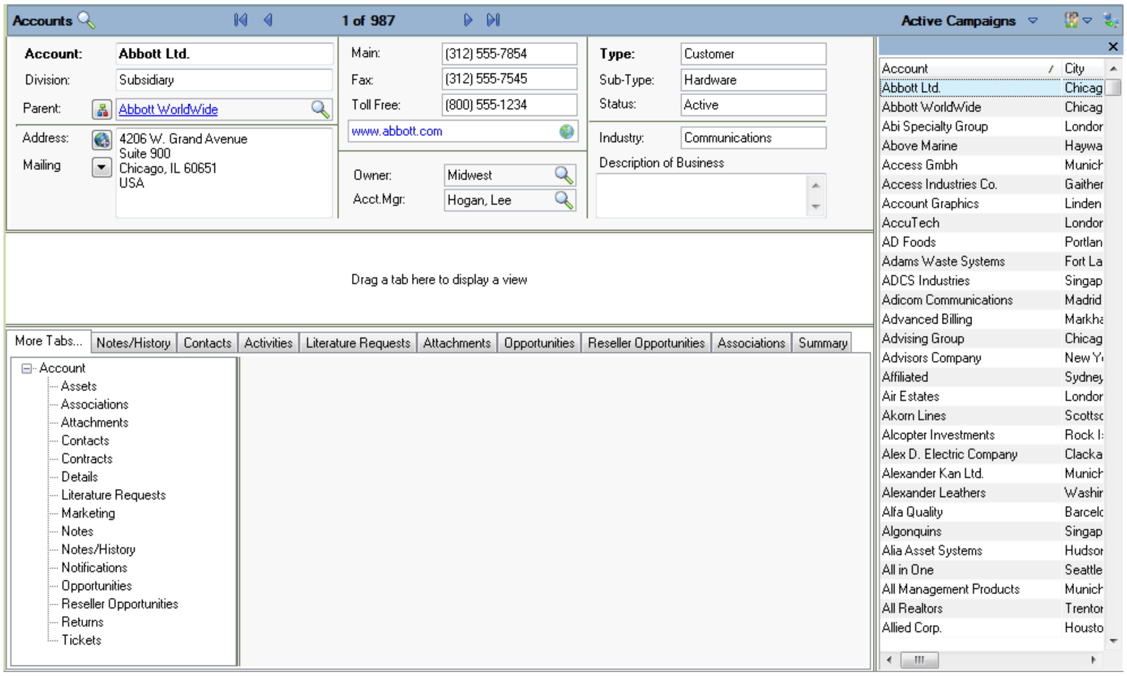
Account: **Abbott Ltd.**
Division: Subsidiary
Parent: Abbott WorldWide
Address: 4206 W. Grand Avenue
Suite 900
Chicago, IL 60651
USA
Mailing
Main: (312) 555-7854
Fax: (312) 555-7545
Toll Free: (800) 555-1234
www.abbott.com
Owner: Midwest
Acct.Mgr: Hogan, Lee
Type: Customer
Sub-Type: Hardware
Status: Active
Industry: Communications
Description of Business

Figure 3 Account Detail View

Using Split Views

Split views display information from both the Detail view and the List view. Using the Split view, you can click the account in the List view section of the screen and display its detail information in the other section of the screen. If you often switch between accounts, use the Split view to manage your information.

- Use **Ctr + F8** to switch between the Split view open or closed.


Accounts
1 of 987
Active Campaigns
Drag a tab here to display a view
More Tabs...
Notes/History
Contacts
Activities
Literature Requests
Attachments
Opportunities
Reseller Opportunities
Associations
Summary
Account
Assets
Associations
Attachments
Contacts
Contracts
Details
Literature Requests
Marketing
Notes
Notes/History
Notifications
Opportunities
Reseller Opportunities
Returns
Tickets

Account: **Abbott Ltd.**
Division: Subsidiary
Parent: Abbott WorldWide
Address: 4206 W. Grand Avenue
Suite 900
Chicago, IL 60651
USA
Mailing
Main: (312) 555-7854
Fax: (312) 555-7545
Toll Free: (800) 555-1234
www.abbott.com
Owner: Midwest
Acct.Mgr: Hogan, Lee
Type: Customer
Sub-Type: Hardware
Status: Active
Industry: Communications
Description of Business

Account	City
Abbott Ltd.	Chicag
Abbott WorldWide	Chicag
Abi Specialty Group	Londor
Above Marine	Haywa
Access Gmbh	Munich
Access Industries Co.	Gaither
Account Graphics	Linden
AccuTech	Londor
AD Foods	Portlan
Adams Waste Systems	Fort La
ADCS Industries	Singap
Adicom Communications	Madrid
Advanced Billing	Markha
Advising Group	Chicag
Advisors Company	New Y
Affiliated	Sydney
Air Estates	Londor
Akorn Lines	Scottsc
Alcopter Investments	Rock I:
Alex D. Electric Company	Clacka
Alexander Kan Ltd.	Munich
Alexander Leathers	Washir
Alfa Quality	Barcelc
Algonquins	Singap
Alia Asset Systems	Hudsor
All in One	Seattle
All Management Products	Munich
All Realtors	Trentor
Allied Corp.	Housto

Figure 4 Account Split View

Getting Help

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

To access online Help, do one of the following:

- Click the **Help** button on any screen in the Infor CRM SLX Windows Client or if a Help button is not available, press **F1**.
- On the **Help** menu, click **Help Topics**.

What do you want to do?	Topic Name
Find out what new features have been added to the Infor CRM SLX Windows Client.	What's New in This Release
Customize the Infor CRM SLX Windows Client options for my personal needs.	Setting User Preferences
Access a graphic display of business process performance to perform in-depth data analysis	Displaying the Sales Dashboard

What do you want to do?	Topic Name
Schedule a meeting and invite others.	Scheduling or Editing an Activity
Schedule an Event (such as a trade show).	Scheduling or Editing an Event
Use the Activity Reminder	Activity Reminder

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.

Your administrator will provide instructions and the install file for installing 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. Open the **InforCRMWordAddinSetup.exe**.
3. Select the **I agree to the license terms and conditions** check box.
4. Click **Install**.
5. If prompted, click **Yes** to confirm that you want to install the add-in.
6. Click **Close**.
7. Open Microsoft Word.
8. If prompted "Are you sure you want to install this customization?" click **Install**.
9. 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.

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.
  - Advanced - To enable drag and drop from Outlook to Infor CRM SLX Web Client using all browsers.
  - Windows - If Microsoft Outlook was not installed before installing the Infor CRM SLX Client, you must perform additional configuration steps. For more information, see the topic "Configuring Outlook if not Installed Prior to Installing Infor CRM SLX" in the Infor CRM SLX Client Help.
- 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.

   - Sync - synchronization options for contacts, appointments (phone calls, meetings and personal activities), and tasks (to-dos). Required for contact and calendar synchronization.
   - 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.
   - Address Book - display options for your Infor CRM SLX Address book. Used for e-mail integration.
   - Logging - ability to turn on or off logging and view logging information for troubleshooting. Used for contact and calendar synchronization
   - 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.

You cannot create personal accounts or contacts in Infor CRM SLX unless your system administrator enables this option for you. Personal contacts would include people such as your spouse or dentist.

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 **Insert** menu, click **Contact/Account**.
2. In the **Add Contact/AccountInformation** dialog box, select **New Contact and New Account**, and then click **Next**.
3. In the **Contact** box, type **Tom Dale**.
   To add hyphenated last names or names with a professional designation, click the ellipsis button in the Contact box. Then use the Enter Name dialog box to specify a name prefix (such as Dr.), first name, middle name, last name, or suffix (such as C.P.A).
4. In the **Account** box, type **Beeker Motors**.
5. In the **E-mail** and **Web** boxes, add e-mail and Web address information.
   - E-mail: **tom.dale@beeker.mail**
   - Web: **www.beeker.web**
6. In the **Work Phone** field, type **5551234512**.
7. 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.
8. Click **OK** to close the **No Matches** dialog box, or click **Cancel** to close the **Matching Records** dialog box.
9. In the **Contact Information** area, in the **Title** box, click the **ellipsis** button and select **Vice President**.
10. Continue to add Tom's information in the **Contact Information** section.
11. Under **Account Information**, double-click in the **Address** box to open the **Edit Address** dialog box and add the Address information for Beeker Motors, as follows:
    - Leave **Description** as **Office**.
    - In the **Address 1** box type **1234 Gary Parkway**
    - In **City**, **State/Prov**, **Zip/Postal** type **Oak Park**, **IL 60305**
12. Click **OK**.
13. In the **Main** box type **5551234500**.
14. Click the **Type ellipsis** button and select **Customer**.
15. Click the **Status ellipsis** button and select **Active**.
16. Click the **Industry ellipsis** button and select **Automotive/Aerospace**.
17. In the **Acct. Mgr.** 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 **Find** button, select **Trade Show** and then click **OK**.
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 **ellipsis** button and select **Managing Director**.
24. Click **OK**.

For more information see the "Adding a New Contact and Account" topic in the Infor CRM SLX Windows 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 **Accounts** Quick Find button (magnifying glass).
    c. In the **Find** box, type **be**, and then click the **Find** button
    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. Right-click in the tab view, and then select **Associate Account**.
4. In the **Account** box, type **Int**, and then click the **Find** button.
5. Click **International Machines** in the account list, and then click **OK**.
6. Click the **ellipsis** button below **Beeker Motors is a** and select **Subsidiary**.
7. Click the **ellipsis** button below **International Machines is a** and select **Parent**.
8. In the **Description** boxes, type a description for each account.
9. 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.

- If you are using Infor CRM SLX on a network, you can access a file directly from the Library without storing the file on your computer.
- Infor CRM SLX Remote users must request files from the Library. When Remote users synchronize, the request is sent to the server and the requested file is delivers during the synchronization.

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. Double-click the file to open.

For more information see the "Working with the Library" topic in the Infor CRM SLX Windows 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 **List/Detail** button.
    c. Click the **Latest Contacts** group tab.
    d. In the list, double-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. Click the **Send by Calendar** button, select a date, and then click **OK**.

5. In the **Send via** (delivery method), and **Priority** boxes, click the **ellipsis** button, select **FedEx** and **Medium**.
6. In the **Cover** box, click the folder button, choose the appropriate cover letter or memo from the list, and then click **OK**.
7. In the **Request for** area, make sure the option of **Current Contact (Smith, Joan**) is selected.
8. Under **Print literature list**, select **with cover letter**.
9. In the **Available Literature** area, select the items you want to include in your request.
    a. Expand **Hardware**.
    b. Select **Lenovo ThinkPad Brochure**.
    c. Double-click the document to set the quantity for each. Use the default of 1 or type a number, and then click **OK**.
10. Click **OK**.

The literature request is recorded on the Literature tab in the Activities 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**.
    a. If prompted, in the **Lookup** box, select **Smith, Joan**, and then click **OK**.
    b. If prompted, in the **Regarding** box, select **Confirm Literature Received**, and then click **OK**.
3. In the **Start Time** box, click the **Calendar** button to select the date and time when the activity will occur, and then click **OK**.
4. 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** boxes, set the expected length of time for the activity.
5. Select the **Alarm** check box to set an alarm to notify you before the activity begins. Use the drop-down boxes to select the number of minutes, hours, or days. You must enter an increment between 1 and 240.
6. Verify the **Name** and **Account** boxes contain **Joan Smith** and **Beeker Motors**.
   If any information is incorrect, click the Find button to change the information.
7. If you have not selected an item for the **Regarding** box, click the **ellipsis** button and select **Confirm Literature Received**.
8. In the **Notes** box, type **Follow-up call for Joan Smith’s literature request**.
9. 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. If your company uses Advanced Outlook Integration, the activity is scheduled in your Outlook calendar.

For more information see the "Scheduling or Editing an Activity" topic in the Infor CRM SLX Windows 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 **Insert** menu, click **Note**.
3. If necessary, modify the **Completed** and **Scheduled** dates. Click the **Calendar** button, select a date, and then click **OK**.
4. If you need to enter a duration for the note, clear **Timeless**, and then select or enter a **Duration**.
5. Verify the **Name** is **Tom Dale** and the **Account** is **Beeker Motors**.
6. In the **Regarding** box, type **Business card notes**.
7. In the **Location** box, type **2012 Trade Show**.
8. In the **Notes** box, type the information on the business card.
9. In the **Priority** box, click the **ellipsis** button and select an item from the list.
10. In the **Category** box, click the **ellipsis** button and select an item from the list.
11. Verify that your name is in the **Leader** box.
12. Use the **Carry Over Notes** or **Carry Over Attachments** check boxes to copy notes or attachments from this note to the follow-up activity.
13. Click the **To-Do** button.
14. If necessary, click the **Attachments** tab to add a document or URL.
15. 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.
16. After scheduling the to-do, click **OK** to save the note.

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 Windows 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 Activity Reminder
- 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 associated 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.

Activity Reminder

The Activity Reminder helps you keep track of any activities (scheduled, timeless, unconfirmed, or recurring) that have a reminder setting. When any of your activities are overdue or if you need to confirm any activities, the Activity Reminder will display. When the Activity Reminder displays, you can choose to act on the listed activities, or be reminded of the activities at a later time.

Closing the Activity Reminder snoozes all of the alarms and activity reminders in the Activity Reminder window.

Current activities are listed first, followed by past due activities in red text, and finally unconfirmed activities in bold. To display past due activities that do not have alarms set, select the Display Past Due check box. Notes for the activity selected in the grid appear in the Notes box below the activities list.

Using the Activity Reminder buttons

Select an activity, and then use these buttons:

Button	Description
Open	Opens the Schedule activity window. If the selected activity is unconfirmed, the Confirmation dialog will open.
Complete	Opens the Complete Activity dialog.
Go To	Presents a list of associated detail views for the selected activity, and opens the selected view. Depending on the activity type, the list may include Account, Contact, Lead, Opportunity, or Ticket views.
Reschedule	Opens a Reschedule Activity dialog, allowing the activity leader (creator) to reschedule an activity or a group of activities.
Dismiss	Turns off the alarm for the selected activity or activities. The activity remains on the Activities list view, but the alarm is reset to 'off'. (Not the same as Snooze, which temporarily disables the alarm.)
Help	Opens the Help topic for the Activity Reminder.
Snooze	Removes the selected activities from the reminder window for the amount of time selected in the **Snooze by:** box.
Snooze All	Closes the reminder window (Snoozes all of the activities) for the amount of time selected in the **Snooze by:** box.

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 Activity**.
3. Select **Phone Call**, and then click **OK**.

4. The **Completed** and **Scheduled** boxes automatically show the current date and time. You can accept the default, or select a new date and time.
5. In the **Regarding** box, click the **ellipsis** button and select **Discuss Opportunities** from the list.
6. In the **Notes** box, type **Tom Dale called about a possible sales opportunity.**
7. To schedule a follow-up activity
    a. Select **Carry Over Notes** to include your notes in the follow-up activity.
    b. Click the **Meeting** button.
8. In the **Schedule Meeting** dialog box, verify that the **Notes** field includes the notes from the phone call.
9. Select a date and time for the meeting, and then click **OK** to schedule the follow-up meeting
10. Click **OK** to complete the phone call.

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

Inviting Others to a Meeting

When you schedule or edit a meeting or a phone call in the Infor CRM SLX Windows 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.

If you company uses Advanced Outlook Integration, you can include non-Infor CRM SLX users in the activity. The Microsoft Outlook Attendee Availability tab appears instead of the Members and Resources tabs.

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 **Members** tab.
5. In the **Available Members** list, find and select another Infor CRM SLX user, and then click **Add**.
   If you are using Advanced Outlook Integration, click Invite Others and select a user from the Outlook Address list.
6. Click **OK**.

The other user will receive an Activity Reminder to confirm the activity. If the other user uses Infor CRM SLX on a network with Advanced Outlook Integration, he or she will receive an Outlook e-mail message to accept or decline the meeting. 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 Windows 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, month, or year 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. You can assign specific colors to each user to help you to determine which activities belong to which users. If an activity is scheduled for multiple users and you are the leader or member, it will display your color. If you are not an activity member or leader, then the activity leader's color will be displayed.

If your company uses Microsoft Outlook, you can view your Outlook calendar in Infor CRM SLX instead of the Infor CRM SLX calendar. To select this option, on the Tools menu, click Options, click the Calendar tab and under Show this calendar, select Outlook.

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.
   - 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.
   - Year View - Displays a 12-month calendar and a list of events and activities scheduled for selected dates. Bold numbers on the calendar indicate dates with scheduled activities.
3. To customize the types of activities you see in the calendar, right-click in the calendar, and on the shortcut menu, point to **Show**, and then select each of the activity types that you want to appear on the calendar.
4. To view the other user's calendar
   a. Click the User button (your name) in the top right corner.
   b. In the **Select Users to View** dialog box, click **Add**, select the other user you want to view, and then click **OK**.
   c. Click **OK**.
5. To print the calendar, on the **File** menu click **Print Calendar Reports**, select your options, and then click **Print**.

For more information see the "Using the Calendar" topic in the Infor CRM SLX Windows 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:

All Open	To-Dos	Events
Calls	Personal	Literature
Meetings	Alarms	Confirmations

The following icons provide information about the activity:

Icon	Description
☎	Phone Call
🤝	Meeting
📋	To-Do
🏠	Personal Activity
📎	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 **Calls** tab.
3. Click the drop-down arrow and select **Tomorrow** from the list.

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 Options** button and use the filters to narrow the list of history items.
4. Right-click the item with the history item to be viewed, and then click **View History**.
5. When you are finished viewing, click **Close**.

For more information see the "Notes/History Tab" topic in the Infor CRM SLX Windows 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 Write 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, 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 10.

In this chapter, you will learn to:

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

Setting E-mail Options

Before you can use e-mail in Infor CRM SLX, you must first set your e-mail options. Use the E-mail tab in the Infor CRM SLX Options dialog box to set up your e-mail application options. Depending on the e-mail application you select, some options will not be available. Your administrator determines which options are available for you to set and can override any changes you make to the e-mail settings. If you notice that your settings have changed, contact your system administrator.

Use the following steps to set up your e-mail options to use Microsoft Outlook as your mail system.

To set e-mail system options for Microsoft Outlook

1. On the Infor CRM SLX Client **Tools** menu, click **Options**, or, right-click in any calendar view, and then click **Options**.
2. Click the **E-mail** tab.
3. In the **Mail System Options** area, in the **Mail System** box, select **Microsoft Exchange** or **Microsoft Outlook**. Microsoft Outlook users: If your company is using the Advanced Outlook Integration feature, you should select **Microsoft Outlook** as your e-mail system.
4. In **Profile Name** box, select from the list of available local profiles.
5. To connect to the e-mail application when you start the Infor CRM SLX Client, select **Automatically Logon to e-mail**.

6. If you connect through the Internet via POP3/SMTP or IMAP4/SMTP, select **Automatically dial**, and then select from the list.
    - Network users: click **None**.
    - Remote users: click your dial-up networking connection name.
7. For **Log to History**, select one of the following options:
    - If you select **Prompt**,
        - When you use the **Send** button in Outlook, no prompt appears, the e-mail is not recorded to History.
        - When you use the **Send to CRM** button in Outlook, the Complete E-mail dialog box opens so you can edit the details of the history item and schedule a follow-up activity.
    - If you select **Always**
        - When you use the **Send** button in Outlook, no prompt appears, and the e-mail is not recorded to History.
        - When you use the **Send to CRM** button in Outlook, no prompt appears, and the e-mail is recorded to History.
    - If you select Never
        - When you use the **Send** button in Outlook, no prompt appears, and the e-mail is not recorded to History.
        - When you use the **Send to CRM** button in Outlook, no prompt appears, and the e-mail is not recorded to History.
8. In the **Record E-Mail to History** area, select **Prompt for Duplicate Contacts** and/or **Prompt for Contact not Found**.
   These prompts are message boxes informing you of a problem when logging the e-mail message to a contact's History.
9. Click **OK**.

For more information see the "Setting E-mail Options" topic in the Infor CRM SLX Windows Client Help.

Using the Write Menu

The following section details working with templates and Mail Merge available from the Write menu.

Mail Merge and template management occur in Microsoft Word. Microsoft Word must already be installed and configured and users must also install and configure the Infor CRM SLX. Mail Merge for Microsoft Word add-in. For more information, see "Understanding Infor CRM SLX Mail Merge for Microsoft Word" on page 9.

For information about the Infor CRM SLX. Mail Merge for Microsoft Word add-in see "Using the Mail Merge Word add-in" on page 29.

Working with Templates

You can use templates to create letters, proposals, or e-mail messages that will be 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 has two types of templates:

- **Public templates** are created and distributed by the system administrator and stored in the Public Templates folder. Public templates usually are released to all users. When you copy a public template and save it to your computer, it becomes a private template.

- **Private templates** are created by a user and are automatically stored in the Private templates folder. When you create a private template, only you have access to the template.

Templates are created using Microsoft Word, so you must have Microsoft Word installed on your local machine for template creation.

For more information click the help button on the Infor CRM SLX Mail Merge for Microsoft Word add-in views in Microsoft Word.

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.

For more information about the Infor CRM SLX Mail Merge for Microsoft Word add-in, see the Infor CRM SLX 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. Do one of the following:
    - In the Infor CRM SLX Client:
        a. On the **Write** menu, click **Template**.
        Microsoft Word opens.
        b. In the **Manage Templates** dialog box, click **New**.
    - 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.

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.
- Add Infor CRM SLX contacts to Outlook and synchronize changes made in Infor CRM SLX to Outlook. For more information, see "Adding a contact to Outlook" in the Sales Client Help.
- When working with an Infor CRM SLX contact in Outlook, you can click the Go to CRM button to open the contact's detail view in the Infor CRM SLX Client.
- Drag and drop e-mail messages from Outlook to the Infor CRM SLX History tab.
- 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 Windows Client Help:

- "Sending an E-mail Message from a Ticket"
- "Understanding Calendar Integration"
- "Understanding Contact Integration"
- "Understanding E-mail Integration"

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. On the **Lookup** menu, point to **Contacts**, and then click **Company**.
   b. In the second box type **be**, and then click **Find**.
   c. Select **Create a temporary group containing all results**, and then click **OK**.
3. Click the **List/Detail** button to open to Contacts List view.

4. Select **Tom Dale** and **Joan Smith**.
   To select more than one record, hold down [Ctrl] or [Shift], and highlight the records.
5. Right-click and select **Write E-Mail to Selected Records**.
6. If the **Select Names** dialog box opens, select both names and click the **To** button, and then click **OK**.
7. If e-mail is enabled, but you have not logged on, at the message box, click **Yes** to log on.
8. In the **Subject** line, type **Out of Office**.
9. 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.
10. 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 dialog box to enter opportunity information and to add products, competitors, or contacts. You can also update the opportunity currency and rate if you have Multi-Currency enabled. You cannot add an opportunity to a personal account.

If you frequently use the same settings when adding opportunities, you can set default values. For more information see the "Setting Opportunity Defaults" topic in the Infor CRM SLX Windows 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.

- If you do not want to add products while adding a new opportunity, you can add them later 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 **Insert** 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**.
   - **Acct. Mgr.** - Click the **Find** button to find the person or team within your organization who manages the account.
   - **Est. Close** - Click the **Calendar** button, select the date that the opportunity is estimated to close, and then click **OK**.
   - **Status** - Your company defines the opportunity status list. Click the **ellipsis** button, and select a status from the list.
   - **Type** - Click the **ellipsis** button, and select **New**.
   - **Source** - Click the **Find** button, and select **Trade Show**.
   - - Click the **ellipsis** button, and then select the probability that this opportunity will be closed from the list.

4. Add the opportunity products.
   a. In the **Products** section, click the **Add** button.
   b. From the **Add Opportunity Product** dialog box, find and select **NetPrinter Laser Elite** in the **Available Products** list, click **Add**, and then click **OK**.
   c. In the grid, click the **Quantity** column and change **1** to **10**.
5. Add the opportunity contacts.
   a. In the **Contacts** section, click the **Add** button.
   b. From the **Select Contact(s)** dialog box, select **Joan Smith**, and then click **OK**.
6. Click **OK**.

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 get statistics for the entire group or select multiple opportunities in the Opportunity List view.
3. 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.

   - Select the record(s) you want to view, right-click in the list view, and then click **Statistics for Selected Opportunities**.
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 **ellipsis** button, select **Closed-Won** from the list, and then click **OK**.
   The Close Opportunity dialog box opens.
3. If necessary, modify the **Actual Close** date. To modify the date, click the **Calendar** button, select a new date, and then click **OK**.
4. In the **Reason Won** box, click the **ellipsis** button, select an item or items from the list, and then click **OK**.
5. In the **Comments** box, type **Delivery must be complete by the end of the financial quarter**.
6. Click **OK**.
   Beeker Motors’ Opportunity Detail view appears with a Closed-Won Status and the Probability automatically updates to 100%.
7. The **Move Products to Assets** dialog box opens, click **OK** to move the printers from opportunity products to assets.

Assigning a Serial Number to an Asset

To assign a serial number to an asset

1. Click the **Beeker Motors** link.
2. Click the **Assets** tab. If the tab is not visible, click the **More Tabs** tab.
3. Double-click **NetPrinter Laser Elite**.
   The Edit Asset dialog box opens.
4. In the **Serial Number** box, type **BMNPLE001**.
5. Click **OK**.

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 **Insert** 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, click **Close**.
8. In the **Title** box, select or type **Managing Director**.
9. In the **Industry** box, click within the box, click the **ellipsis** button, select **Healthcare/Medical/Pharmaceutical**, and then click **OK**.
10. In the **Interested in** box, type **accounting software**.
11. In the **Lead Source** box, click the **Find** button.
12. In the **Lookup Lead Source** dialog box, click the **Find** button, select **Word of Mouth/Referral**, and then click **OK**.
13. In the **Insert Lead** dialog box, click **OK**.

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 **Insert** menu, click **Import Leads**.
2. Click the **Lead List File** Open button, browse to the list you want to import, and then click **Open**.
   The Import Leads Preview dialog box opens.
3. 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 "Import Leads Preview" topic in the Infor CRM SLX Windows Client Help.

4. Click **OK**.
   The wizard moves to Step 3, Map Fields.
5. 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. In the **Match this field from the list** box, select the external list field you want to match. If you need to preview the imported list, click **Preview**.
   b. In the **with this field in Saleslogix** box, select the Infor CRM SLX field that the list field should be matched with.
   c. Click **Match**.
   Matched fields display in the Matching Fields box.
6. Repeat the previous step for each field that needs to be matched.
7. Click the **Default Owner Find** button to select the person or team within your organization that will own the imported leads.
8. Click the **Default Lead Source Find** button to select how the imported leads were generated.
9. Click **Import**.

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 **Leads** Quick Find button (magnifying glass).
3. In the **Find** dialog box, type **green**, click the **Find** button, and then double-click **Green, Bob** in the list.

4. In the **Qualification** box, click the drop-down arrow, and then click **Lead**.
5. 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**.
6. Once the lead is qualified and ready to convert to a contact and account, click the **Convert Qualified Lead** button.
7. In the **Convert Lead** dialog box, verify that no existing contacts or accounts match the lead you are qualifying.
8. 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 **Insert** menu, click **Campaign**.
   The Insert Campaign dialog box appears.
2. In the **Campaign Name** box, type **IL Return Mail Ad Q4 FY2026**.
3. In the **Description** box, type **Return mail advertisement for IL - Fall 2026**.
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 Source** box, click the **ellipsis** button, select **Advertising - General**, click **Add**, and then click **OK**.
7. In the **Products** box, click the **ellipsis** button, type **Po** in the filter box, click the **Find** button, select **Pocket PC**, click **Add**, and then click **OK**.
8. In the **Status** box, select **Setup**.
9. In the **Code** box, type **RMAdQ42026**.
   The code is a unique identifier for this campaign.
10. In the **Start Date** box, type or select next Monday’s date.

11. In the **End Date** box, select a date 3 months in the future.
12. In the **Manager** box, click the **Find** button, select your name, and then click **OK**.
13. Leave the **Owner** as **Everyone**.
14. Click **OK**.
    You can add targets, stages, and tasks using the Insert Campaign dialog box. However, the steps in the following sections describe how to add these records after the campaign has been added to Infor CRM SLX.

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 FY2026** campaign in the Campaign Detail view.
3. Click the **Targets** tab.
4. Click the **Manage List** button .
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. After viewing the number of targets, click to **OK** to close.
7. 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.
8. Click **OK**.

When you leave and return to the Targets tab, you may need to click Refresh in order to see the list of targets.

Adding Campaign Stages and Tasks

To add a stage to a campaign

1. Open the **IL Return Mail Ad Q4 FY2026** campaign in the Campaign Detail view.
2. Click the **Stages/Tasks** tab.
3. Right-click within the **Stages/Tasks** tab, and then click **Add Stage**.
    The Add Stage dialog box appears.
4. In the **Description** box, type **Prepare ad slick**.
5. In the **Status** box, click the **ellipsis** button, and select **In Progress**.
6. In the **Comments** box, type **Used in-house ad department. Updated campaign previously targeted to state of CA.**
7. In the **Start Date** box, select today’s date.
8. In the **End Date** box, select a date one week from today.

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 **Add Stage** dialog box, click **Add Task**.
2. In the **Description** box, type **Update CA ad slick from FY2011 Q4 campaign**.
3. In the **Status** box, click the **ellipsis** button and select **Completed**.
4. In the **Priority** box, click the **ellipsis** button 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. In the **Add Stage** dialog box, click **Add Task**.
11. In the **Description** box, type **Print new ad slick**.
12. In the **Status** box, click the **ellipsis** button, 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**.
17. 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 FY2026** campaign in the Campaign Detail view.
2. In the **Products** box, click the **ellipsis** button.
3. In the **Add Campaign Product** dialog box, click the **Find** button.
4. In the **Available Products** list, select **GoStore 200GB** and **Kiva Big Mouth Briefcase**, click **Add**, and then click **OK**.

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 FY2026** campaign in the Campaign Detail view.
2. Verify all the information is correct.
3. Click **Launch**.
4. Review the **Launch Summary** report.
5. Click **Close** when finished.

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 Windows 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 FY2026** campaign in the Campaign Detail view.
2. Click the **Responses** tab.
3. Right-click within the **Responses** tab, and then click **Add Response**.
4. Select **Contact**, click the **Contact Find** button, type **st**, click the **Find** button, select the first name in the list, and then click **OK**.
5. Click the **Response Method ellipsis** button and select **Phone**.
6. In the **Comments** box, type **Responded within 5 days. Qualifies for 10% discount and free carrying case**.
7. 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. Right-click in the grid and then click **Insert New Contract**.
3. Complete the contract information boxes.
    a. Select **Active**.
    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. In the **Comments** box, type **New 1 year contract for 10 incidents. Qualifies for new customer discount.**
    d. Click the **Service ellipsis** button and select **Classic Care Ultra** from the list.
    e. Click the **Contract Type ellipsis** button and select **Incidents** from the list.
    f. Leave the **Start Date** as today's date.
    g. Click the **Expiration Calendar** button and select the date one year from today.
    h. In the **Quantity** box, type **10**. This specifies that the contract covers 10 incidents in the next year.
    i. Type a purchase order number in the **PO Number** box.
    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.
4. Click **OK**.
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. Right-click in the grid and click **Associate Asset**.
    c. In the lookup, in the box type **BMNP**, click the **Find** button, select **BMNPLE001**, and then click **OK**.

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 **Insert** menu, click **Ticket**.
3. In the **Insert Ticket** view, verify **Beeker Motors** appears in the **Account** box.
4. If the **Insert New Ticket - Account Service Information** dialog box is displayed, then select the contact for the ticket from the list of available contacts. In this case, select **Tom Dale**.
5. If necessary, in the **Contact** box, click the **Find** button, and then select **Tom Dale**.
6. 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**.
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 **Source** box, click the **ellipsis** button, select **Phone**, and then click **OK**.
11. In the **Status** box, click the **ellipsis** button, and then select **In Process**.
12. Click the **Urgency Find** button, select **Med-High**, and then click **OK**.
13. In the **Needed Date** box, use the **Calendar** button to select a date at the end of the week.
14. Verify the **Assigned To** box lists your name. If necessary, click the **Find** button and select your name from the list.
15. In the **Subject** box, type a short summary of the problem.
16. In the **Description** box, press **Shift**+**F9**, and then type detailed information for the problem.
17. Under **Comments**, in the **Internal Only** box, press **Shift**+**F9**, and then type additional information that is important to the ticket.
18. Click **OK**.

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. Right-click in the tab area, and then click **Insert New Activity**.
   The Insert New Ticket Activity dialog box opens.
4. In the **Type** box, click the **ellipsis** button, and then select **Research**.
5. In the **Public Access** box, click the **ellipsis** button and select **1-Customer**.
   This setting determines whether customers will be able to see the ticket activity using Infor CRM SLX Customer Portal.
6. 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.
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. 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.
10. (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.
11. In the **Comments** box, type **Research printer power issues.**
12. Click **OK**.

For more information see the "Adding and Editing Ticket Activities" topic in the Infor CRM SLX Windows 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 double-click the ticket.
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. Double-click the **Timed** activity to edit and then click **Open Activity**.
5. Enter the information from your conversation with Tom Dale in the **Comments**.
6. Click **OK**.
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. In the **Status** box, click the **ellipsis** button, select **Closed**, and then click **OK**.
4. If you are prompted to complete open activities for the ticket, do one of the following actions:
   - Click **Yes** to automatically complete any open activities which belong to you and do not have an End Date.
   - Click **No** close the ticket, leaving the ticket activity without an End Date.
5. Click the **Details** tab and update the **Resolution**.
   a. Press **Shift+F9**.
   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. Right-click and click **Insert New Return**.
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 **OK**.
    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 **Return Details** tab. If the tab is not visible, click the **More Tabs** tab.
3. Right-click in the **Assets to Return** grid, and click **Associate Asset**.
4. Locate and select the **NetPrinter Laser Elite printer** using the lookup. In the box type **BMNP**, click the **Find** button, and select **BMNPLE0001**.
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 **Contact**.
3. Use the **Ship Via** 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. Right-click in the **Assets to Ship** grid, and then click **Add**.
2. In the **Insert New Shipped Product** dialog box, under **Returned Product**, click the **Product SKU 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 Windows 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. Right-click in the gird, and click **Insert New Defect**.
4. Click the **Project ellipsis** button and select **Hardware**. Click **OK**.
5. In the **Version Found** box, click the **ellipsis** button,and select **1**. Click **OK**.
6. In the **Target Version**, click the **ellipsis** button, and select **2**. Click **OK**.
7. In the **Area** box, click the **Find** button and in the **Area** list select **Hardware**.
8. In the **Category** list, select **Printer**.
9. In the **Issue** list, select **Power**, and then click **OK**.
10. Leave the **Status** as **Open**.
11. In the **Source** box, click the **ellipsis** button, and select **Parts**.
12. In the **Type** box, click the **ellipsis** button, and select **Power**. Click **OK**.
13. In the **Priority** and **Severity** boxes, click the **ellipsis** button, select the importance and impact of the issue. Click **OK**.
14. In the **Frequency** box, click the **ellipsis** button,and select **Weekly**. Click **OK**.
15. Click the **Assigned To Find** button , select your name from the list, and then click **OK**.
16. In the **Subject** type **Printer fan stops and printer overheats**.
17. In the **Description** box, press **Shift+F9**, and then type **Cooling fan stops which causes the printer to overheat and turn off during a print job**.
18. Click **OK**.

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 **ellipsis** button and select an item from the list. Click **OK**.
3. In the **Status** box, click the **ellipsis** button, and then select **Closed**. Click **OK**.

4. In the **Resolution** box, press **Shift+F9**, and then type **Fan is too small. Any printers experiencing this problem should be returned and the fan will be replaced.**
5. Click **Save**.

Chapter 8
Using 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.

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

The Infor CRM SLX Dashboards and widget panels allow you to use widgets 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:

- Run a report
- Create and save a report filter
- Understand the Sales Dashboard
- Adjust Content Set data
- Access Analysis Views and set filters

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 **Select the type of report** list, select **Contact**.
3. In the **Select the name of the report** list, select **Contact Summary - Sample**.
4. Next to **Show Records that match**, click **Edit**.

5. In the **Conditions Match** box, select **All**.
6. IIn the **Match By** list select **Group**, and then in the **Table** list, select **My Contacts**.
7. Click the plus sign to add the condition.
8. In the **Send the report output to** box, select **Preview**.
9. Click **Generate Report**.
10. In the **Enter Parameter Values** dialog box, choose whether you would like to include notes and whether you would like each contact to display on a separate page.
11. Click **OK**.
12. In the report preview you can:
    - Use the tree view in the left pane to view specific pages in the report.
    - Use the arrow buttons to move to the next, previous, first, and last pages.
    - Print the report.
    - Export the report to a variety of supported file formats.

For more information see the "Filtering Data in Reports" topic in the Infor CRM SLX Windows Client Help.

Working with the Sales Dashboard

The Sales Dashboard allows you to display and interact with a variety of performance and analysis tools in a dashboard format. You can use the data in the dashboard to gain insight into organizational and individual performance - and to discover root causes for performance issues - allowing you to make strategic decisions or to take corrective actions. From the Sales Dashboard, you can interact directly with other functions in Infor CRM SLX, such as completing activities and displaying opportunity views.

Understanding Dashboard Features

The Sales Dashboard is divided into three sections: an activities area, a standard Infor CRM SLX middle pane (a user-defined area), and a tab area.

Activities Area - The activities area offers a view into your Infor CRM SLX activities. This area shows your schedule for the day, and your timeless and past-due activities. You can right-click on an item to open the original activity record for editing or review, or to schedule new activities.

Middle Pane - The middle pane (also called the user-defined area) serves as an open view of the content set you use most often. You can change the content set in this area depending on your specific needs, or close it to allow for more space to expand the Activities or content set areas.

Content Sets - These are graphs and a grid that give you a simplified view of business performance. You can change some of the data in content sets, and you can drill to an analysis view from most content sets.

To display the Sales Dashboard

- On the Navigation Bar, click **Dashboards**, and then click **Sales Dashboard**.

Using the Activities Area

The activities are contains two sections:

- The Today's Schedule section shows your scheduled activities for the current day.
- The My Activities section shows your timeless and past due activities. You can right-click on any activity to open and act on it, or to create new activities.

Using Content Sets

Content sets display performance data in both graph and grid formats. The emphasis in content sets is on the 'top five' results for the data displayed.

- The data in the graphs represent the data in the grid. You control the data in the grid by selecting filter parameters using drop-down menus above the grid. The grid will display the most significant five results for your filter selections, plus an additional row that summarizes all the data not included in the top five. A grand total row at the bottom of most grids calculates the results.
- The graphs reflect the grid data, When you adjust the filter parameters, the grid data changes automatically. The graphs also change to reflect the new gird data.
- The size of the graphs and the grid can be changed by moving their borders.

Changing Content Set Parameters

You can change content set parameters to see how processes and people are performing over time. You can select different aspects of a business process to examine, as well as select standard or custom time periods for comparison.

Our scenario:
You want to see the top performing account managers for the last 30 days and 90 days.

To view sales performance

1. On the Navigation Bar, click **Dashboards**, and then click **Sales Dashboard**.
2. Click the **Sales** tab.
   The content set opens and displays the grid and graphs associated with the content set.
3. In the **List By** menu, select **Account Manager**.
   The grid and graphs refresh.
4. In the **Period** box, select **Last 30 Days**.
   The grid and graphs refresh. Note the Grand Total information at the bottom.
5. In the **Period** box, select **Last 90 Days**.
   The grid and graphs refresh. Check the Grand Total information at the bottom to see if the information changed.

For more information see the "Using Contents Sets" topic in the Sales Dashboard Help.

Using Analysis Views

Analysis views display information similar to content sets, but they offer more options for filtering data. Analysis views are opened by clicking links on content sets.

- Like a content set, the grid is the key to an analysis view.The graphs represent the data in the grids. You control the data in the grid by using filters. A grand total row at the bottom of most grids calculates the results.

- You can select individual filter values from a variety of filter groups in order to precisely focus your search results.
- The size of the graphs and grid can be changed by moving their borders.
- Analysis view grid results can be exported to Microsoft Excel with a single mouse click.

Changing Analysis View Filters

Filtering allows you to focus on specific data. For example, if you select Last 30-days from the Period box, the database returns results for the last 30 days only. You can further refine your results by drilling for more information.

Our scenario:

You want a detailed look at open opportunities in your company. Specifically you would like to know how much potential revenue each account manager has in the prospect stage of the opportunity pipeline.

To open an analysis view

1. On the Navigation Bar, click **Dashboards**, and then **click Sales Dashboard**.
2. Click the **Open Opportunities** tab.
3. Click the first hyperlink in the **Account Manager** column.
   This opens the Open Opportunities Analysis view window, with the Account Manager filter set to the parameter you selected from the Open Opportunities content set.
4. Click **Filter Options**.
   The filter pane opens with a list of filter items. Note that the Account Manager filter shows the account manager you selected in the previous step.
5. Click **Clear Filters** in the filter options panel on the left side of the analysis view.
   With the filter restriction removed, the grid and graphs refresh to display all available data for open opportunities. List By is still set to Account Manager.
6. In the **Value** column, click **ALL** next to the **Opportunity Stage** filter.
7. Click the **ellipsis** button in the **Value** column.
   The Add Edit Filter Values dialog box appears.
8. Select **1-Prospect**. You can search for values using the scroll bar or by typing in the **Find** box to refine your selection
9. When you are finished, click **OK**.
   The sales potential for open opportunities in the prospect stage are listed by account manager in the grid and graphs.

   You can click Filter Options to hide the filter panel, which increases the viewable area for the grid and graphs in the analysis view.

10. To print the analysis view, on the **File** menu, click **Print Screen**.
11. To export the grid data to Microsoft Excel, click **Export to Excel**.
    An Excel workbook opens with all the grid columns and data represented. (Requires Microsoft Excel)

    Only the number of rows displayed in the grid are exported. Use the Show Rows selector to display additional rows if required.

For more information see the "Selecting Filters in Analysis Views" topic in the Sales Dashboard Help.

Chapter 9

Using Infor CRM SLX Away from the Office

When you work outside the office, it is important that you are able to obtain up-to-date sales information for your company. By using the Infor CRM SLX Remote Client, you can have the tools to keep your information current with the information at the main office.

In this chapter you will learn to:

- Synchronize your Remote database with the main office database
- Use What's New to track changes to your local database
- Subscribe to accounts

Understanding Synchronization

Synchronization is an exchange of files between remotes and the main office. The following examples demonstrate the synchronization process.

- A Network user, working on a machine connected to your company's network, makes changes directly to the main office database.
- A Remote user, working on a machine connected to your company's network, makes changes directly to the main office database.
- Remote Office users make changes directly to the Remote Office database (as a Network user). The Remote Office connects to the main office to drop off and retrieve files using the same process as Remote users.
- Synchronization uses the files delivered by the Remote users and offices to resolve any conflicts, apply Remote user and office changes to the main office database, and then create files detailing changes for the Remote users and offices.

Synchronizing with the Main Office Database

To keep your Remote Client database current with the main office, it is important to synchronize regularly. If you do not synchronize every day or every other day, the databases with shared records (main office and Remote Clients) soon become out of date. Frequent synchronization also helps reduce synchronization time since a smaller number of transactions are processed.

Automatic Synchronization allows you to synchronize automatically when you first connect to the main office, and periodically thereafter while still connected. Automatic sync is enabled by default. To learn more, see the “Infor CRM SLX Synchronization Client” topic in the Infor CRM SLX Client Help.

To synchronize with the main office database

1. On the **File** menu, click **Synchronize**.
2. On the **Automatic Sync** tab, select **On**.
3. In the **Sync runs when you first connect and then every** boxes, set the time you want synchronization to occur.
4. Click the **Sync Options** tab.
5. To synchronize using a dial-up connection, select the **Connect using RAS** option, and then select your profile in the **RAS Profile** list. Clear the **Connect using RAS** check box if your are connecting via a network connection.
6. Click **Sync Now** to begin the synchronization process.
7. When the synchronization is complete, click **Close**.

If errors occur during synchronization, contact your system administrator to resolve them.

Reviewing Synchronization Changes

After synchronizing, you can use What’s New to see the changes that were made to your database.

To view synchronization changes using What's New

- On the Navigation Bar, click **What's New**, and then click on of the options of the bottom of the window.

Click	To check for
New	New accounts, contacts, opportunities, activities, notes, history, and documents.
Updated	Accounts, contacts, opportunities, activities, notes, and history you subscribe to that were changed by other users.
Deleted	Accounts, contacts, or opportunities deleted by other users.

Understanding Conflict Resolution

Because records that reside on both the main office database and Remote databases can be inserted or changed independently, a mechanism is needed to decide which changes are valid. The Conflict Resolution component of synchronization decides which change wins.

The administrator can identify up to three criteria to determine which user wins when a conflict occurs.

Conflicts are resolved when changes are applied to the Network database, not the Remote database.

Understanding Subscription

You can use subscription to select, or subscribe to, accounts you use on a regular basis and want to store on your local database. Using subscription minimizes your database size and the time required to synchronize updated information to the main office database. You and your system administrator can establish what accounts you need to subscribe to.

- You automatically subscribe to accounts you own as an individual or as a member of a team. You cannot unsubscribe to these accounts.
- Other Infor CRM SLX users that are added to your security profile (by the system administrator) can subscribe to the accounts you own as an individual or as a member of a team.

Activity auto-subscription: If a user is assigned to an activity as a member, but the account is not in his or her database, the user is automatically subscribed to the account. The exception is if the user does not have access rights; in that case, the user receives notification of the activity, but is not subscribed to the account.

To subscribe to an account

1. On the Navigation Bar, click **What's New**.
2. Click the **Accounts** tab.
3. Find the accountyou want to subscribe to,right-click, and then click **Subscribe**.
   You will receive updated information for this accountduring synchronization.

To unsubscribe from an account

1. On the Navigation Bar, click **What's New**.
2. Click the **Accounts** tab.
3. Find the accountto which you no longer want to subscribe, right-click, and then click **Unsubscribe**.
   You will no longer receive updated information for this accountduring synchronization.

For more information see the "What is Synchronization?" and "Subscription and Security" topics in the Infor CRM SLX Windows Client Help.

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