Infor CloudSuite CRM v8.4

Quick Reference Card

for the Sales and Marketing User

Find Records Fast

Finding one record	Use **Quick Find**: In the title bar of a list or detail view, click the button.
Finding records and creating a group	Use **Lookups**: On the **Lookup** menu, point to the type of record you are looking for, click the criteria you want to look for, enter the search information in the box, and then click the (Find) button. Select **Create a temporary group containing all results**, and then click **OK**.
Using SpeedSearch	Click the **SpeedSearch** button in the toolbar. You can: • Match on all words any words the exact phrase • Use natural language • Search on the root by thesaurus on sound like • Use Boolean search criteria

Get Help

Finding scenarios to walk you through tasks	To find the Getting Started Guide go to **Start> Programs> Saleslogix>Documentation**.
Opening online Help	• Click the **Help** button or press **F1** to open the help system.

Commonly Used Icons

Finding Sales and Marketing Features	**Working with Records**	**Moving Around**
Accounts	Find	First
Contacts	Calendar	Previous
Leads	Ellipsis	Next
Opportunities	E-mail	Last
Campaigns	Web	Back
Library	View address	Forward
Sales Dashboard	Save Undo	List View

Work the Way I Want To

Using groups	Create groups for records you want to track.
Accessing your groups	Do one of the following: • On a Main view, in list view layout, click a group tab. • On the **View** menu, click **Groups**.
Selecting records to create a group	1. From any Main view, in list view layout, select one or more records. To select more than one record, hold down **[Ctrl]** as you click each item. 2. Right-click anywhere in the grid and click **Add Selected Members to New Group**. 3. Use **Query Builder** to define group properties, layout, sorting, appearance, and defaults. 4. Click **OK**.
Sharing your group with other users	1. Open the list view containing the group you want to share. 2. Right-click the group tab, and then select **Share Group**. 3. In the **Owner Assignment** dialog box, click **Add**. 4. Click the **Users**, **Departments**, or **Teams** tab, select who you want to share your group with, and click **OK**. 5. Click **OK**.
Setting user options	On the **Tools** menu, click **Options**, and use each tab to set specific options.

Get My Tasks Done

Receiving reminders	Use **Activity Reminder** to notify you of your alarms, past due activities, and unconfirmed activities. • On the **Tools** menu, click **Activity Reminder**.
Viewing my activities	Use **Activities List** view to manage your scheduled activities and events by type. Select the time frame for the displayed items. • On the Navigation Bar, click **Activities** or press **F7**.
Using my calendar	Manage your time and keep track of scheduled activities and events. View your schedule by the day, week, month, or year. You may also be able to view other users' activities and events. • On the Navigation Bar, click **Calendar** or press **F4**.
Scheduling a call, meeting, or to-do	On the **Schedule** menu, do one of the following: • Click the type of activity you want to add • Press **Shift+F3** for a phone call • Press **Alt+F3** for a meeting • Press **Ctrl+F3** for a to-do
Inviting other users	Use the **Members** or **Attendees** tab to invite other CRM users to a phone call or meeting.
Completing an activity	Do one of the following: • Right-click the activity you want to complete and click **Complete Activity**. • On the **Schedule** menu, click **Complete Activity**.
Adding records	On the **Insert** menu, select the type of record you want to add – contact, account, lead, opportunity, campaign, or note.
Checking on notes and history	Open a record's detail view and click the **Notes/History** tab. Use the filters to narrow the list.
Using my Sales Dashboard	Display and interact with a variety of performance and analysis tools in a dashboard format. • On the Navigation Bar, click **Sales Dashboard**.
Creating a literature request	Send information to your prospect or customers. On the **Schedule** menu, click **Literature Request.**
Seeing a list of recently-viewed items	On the tool bar, click the **History** button, and select an item from the list.

Communicate Effectively

Sending an e-mail	Do one of the following: • On the **Write** menu, click **E-mail**. • On the toolbar, click the **E-mail** button. • Next to an e-mail address in a detail view, click the **E-mail**.
Making notes on a record	On the **Insert** menu, click **Note**.
Creating form letters, e-mail, and faxes	1. On the **Write** menu, click **Mail Merge**. 2. Use the **Merge** and **History** tabs to select a template, records to include, the type of output to create (e-mail, fax, file, or printer), and history options. 3. Click **Merge**.

Adding and qualifying leads	On the **Insert** menu, do one of the following: • To add a single lead, click **Lead**. • To import a list of leads, click **Import Leads**. Use the lead qualification check boxes on the **Lead Detail** view to validate information and determine if the lead is ready to be converted to a contact and account. To convert a qualified lead, click **Convert Qualified Lead**.
Creating and launching campaigns	On the **Insert** menu, click **Campaign**. Select targets, define stages and tasks, and add products to a campaign. When the campaign is ready, click **Launch.** Use the stages and tasks and target responses to monitor the campaign's progress and success.
Pursuing opportunities	On the **Insert** menu, click **Opportunity**. Use sales processes to manage your sales pipeline. On the toolbar, click **Opportunity Statistics** to display opportunity statistics. When an opportunity is won or lost, change the **Status** to **Closed-Won** or **Closed-Lost** and enter reasons for closing the opportunity.
Making sales orders	Use sales orders to add billing/shipping addresses and products to an opportunity. On the **Opportunity Detail** view, click the **Sales Orders** tab, right-click and select **Insert Sales Order**.