Infor CRM v8.4

Quick Reference Card

for the Web User

Find Records Fast

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

Work the Way I Want To

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

Commonly Used Icons

Working with Records

Find	Refresh	Add
Calendar	Email	Associate
Save	Web	Delete/Remove
Reset	View Address	Edit

Moving Around

First	Next
Previous	Last

Communicate Effectively

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

Get My Tasks Done

Receiving alerts	See **Alerts** and **Past Due** notifications in the menu bar.
Viewing my activities	Use the **Activities** List view to manage your scheduled activities and events by type. Select the time frame for the displayed items. On the **Navigation** Bar, click **Activities**.
Using my calendar	Manage your time and keep track of scheduled activities and events. View your schedule by the day, week, month, or year. You may also be able to view other users' activities and events. • On the **Navigation** Bar, click **Calendar**.
Scheduling a call, meeting, or to-do	On the **Schedule** menu, click the activity to add.
Inviting other users	Use the **Availability** tab to invite other Infor CRM users to a phone call or meeting.
Completing an activity	Do one of the following: • Open the activity and click **Complete.** • On the **Schedule** menu, click **Complete Activity.**
Adding records	On the **New** menu, select record to add.
Checking on notes and history	Open a record's detail view and click the **Notes/ History** tab. Use the filters to narrow the list.
Using the Dashboard	Display and interact with a variety of performance and analysis tools in a dashboard format. • On the Navigation Bar, click **Welcome.**
Using the Office Integration Module	Send the same information to numerous contacts using **Mail Merge**. To install: 1. Expand the **Tools** menu and click **Options**. 2. On the **General** tab, click **Install Office Integration.**

Get Help

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

Meet My Goals

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